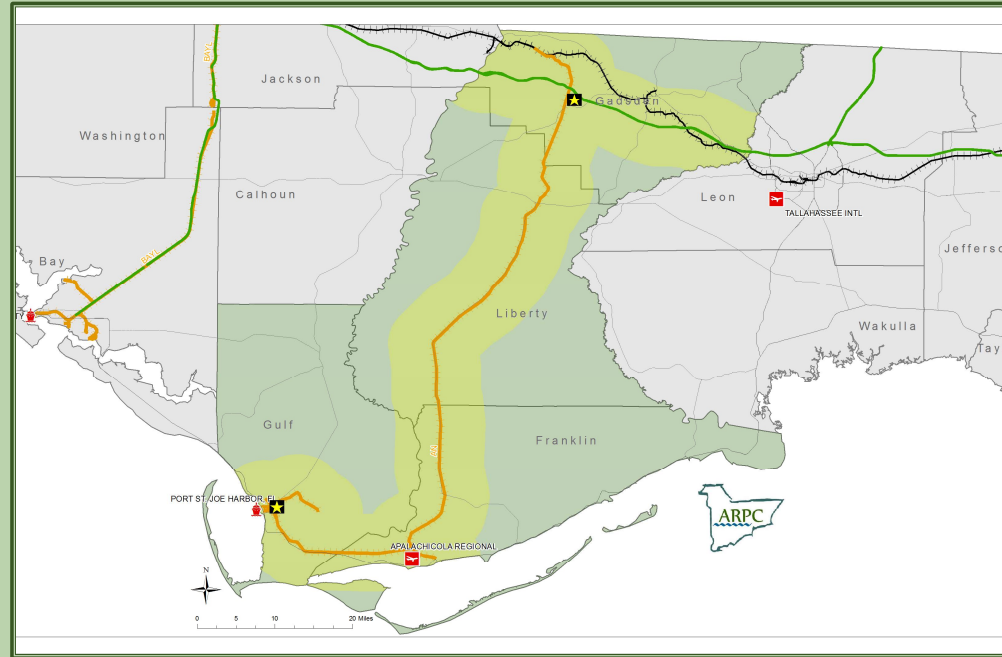


GULF TO GADSDEN FREIGHT LOGISTICS ZONE



STRATEGIC PLAN



***Apalachee Regional
Planning Council***



Contents	PAGE
Executive Summary	3
Introduction	6
Freight Logistics Zone	7
The Study Area	8
Freight Movement in the Area	8
Potential Intermodal Logistics Centers	10
Logistic Clusters	13
Stakeholder Coordination	14
The Freight Logistics Zone	15
Existing Transportation Infrastructure	15
Planned Freight Infrastructure Projects	20
Workforce Availability	22
Workforce Training Capabilities	25
Development Incentives	32
Consistency with Local Plans	36
Strategic Infrastructure Improvements Element	38
Appendix A Strategic Sites Inventory	
Appendix B FLZ Stakeholders Summit Presentations	
Appendix C Detailed County Map Series	
Appendix D Supporting Data	
Appendix E Plan References	



Photo 1. Bulkhead Improvements on the Gulf County Canal, Port St. Joe

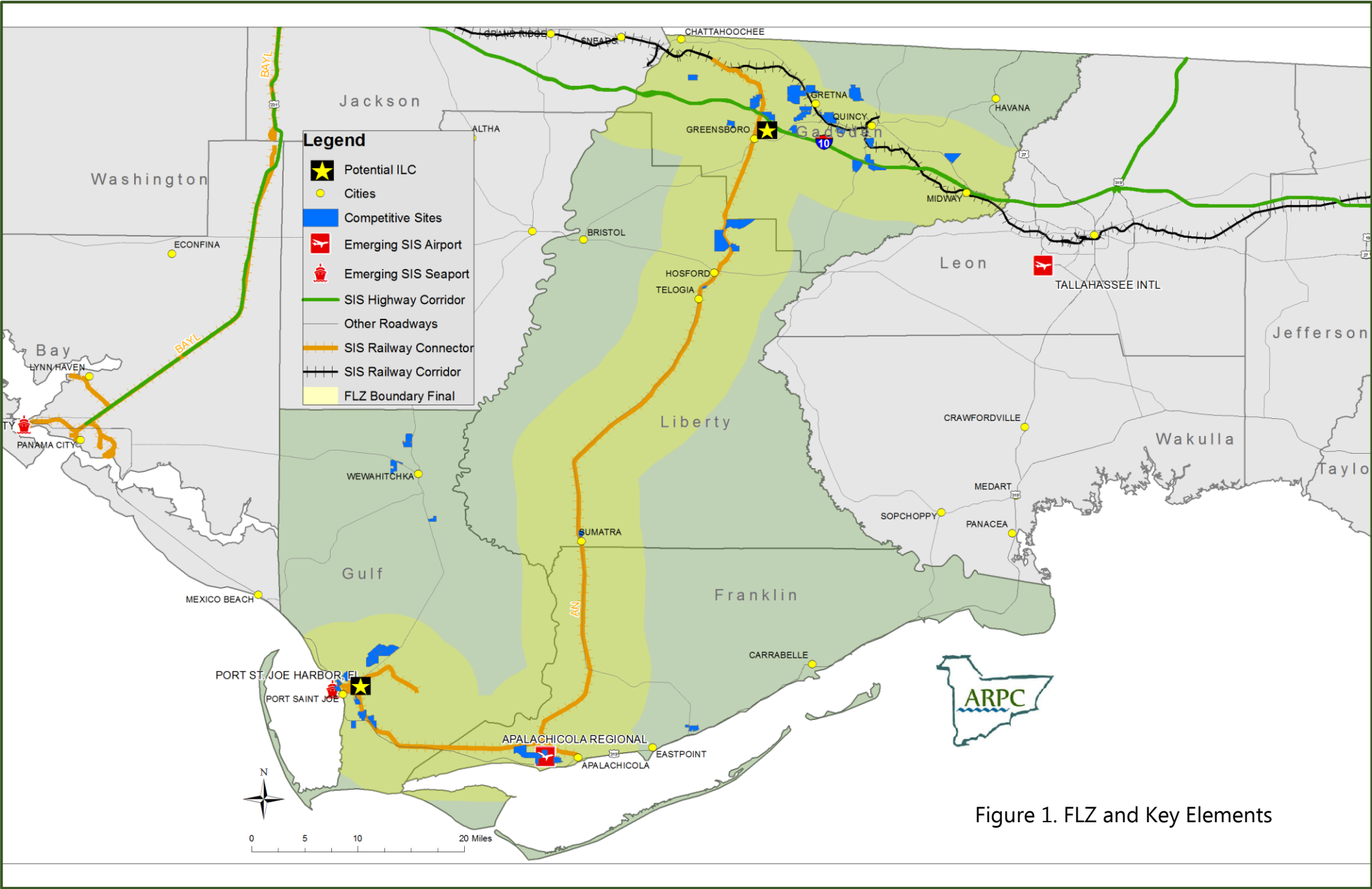


Figure 1. FLZ and Key Elements

EXECUTIVE SUMMARY

A Freight Logistics Zone (FLZ) is defined as a grouping of activities and infrastructure associated with freight transportation and related services within an area around an Intermodal Logistics Center (ILC). The purpose of the Gulf to Gadsden FLZ Strategic Plan is to identify a zone and supporting infrastructure that serves a strategic interest in the region and the State; collect and analyze freight activity data and needed infrastructure improvements and identify needed infrastructure improvements to the FLZ to be considered for priority on state funding. The strategic infrastructure improvements identified in the Plan reflect the priorities to improve intermodal connectivity in the region and are recommended as prime candidates for priority in state funding and incentive programs relating to FLZs.

Gulf to Gadsden FLZ

The Gulf to Gadsden Freight Logistics Zone, depicted in **Figure 1**, is located in Northwest Florida, a region with an extensive network of intermodal assets serving northern Florida and the US southeast and Mid-West. The FLZ includes the Port of Port St Joe and is in proximity to the Port of Panama City and the Port of Pensacola in the Gulf of Mexico. The FLZ is in proximity to the Tallahassee International Airport, the Northwest Florida Beaches International Airport and Pensacola International Airport. The FLZ has access to I-10 and is in proximity to other highway facilities, rail connections through the Apalachicola Northern, (AN), railway and the CSX Railroad as well as the Gulf of Mexico and Florida's Intracoastal Waterway. Additional information on how the FLZ is delineated can be found below in the "Freight Logistics Zone".



Photo 2. Coal Barges Docked at the MTI site on the Gulf County Canal

Source: Materials Transfer Industries website

The City of Port St Joe has a long history of industrial and commercial port activity dating back to the early 1900s; the strategic location of the Port of Port St Joe has always been recognized by shippers as it facilitates domestic and international commerce and plans for redevelopment of the port now have full support of the local, regional and State government agencies. Landing cargo in Port St. Joe can take a full day off a truck haul to America's heartland, and avoid lengthy tie-ups in the complex port to rail connections in south Florida.

The proposed ILCs in Gulf and Gadsden County and other intermodal assets within the LZ have significant potential for growth. The FLZ will be served by a proposed Foreign Trade Zone at the Tallahassee International Airport and the existing Foreign Trade Zone 65 in Panama City. The transportation infrastructure improvements needed to provide access to these freight generators is critical to improve the northwest Florida competitive advantage and promote growth and development of the FLZ as an engine of freight activity and job creation in the region and the State.

The Port Authority of Port St. Joe has long maintained the logistical advantage of bringing in appropriate sized shipping as opposed to the more southern ports in Florida. As seen in Figure 3, with almost identical miles traveled by sea, cargo off-loaded at Port St. Joe, saves an entire travel day by truck to destination points in the continental US. As will be shown below, the region's road and rail infrastructure are capable of handling this cargo.

Recent activity at the Port includes leases to Eastern Shipbuilding and the International Wood Group. Eastern Shipbuilding plans to use their facility to finish new ships under an existing multi-million dollar contract with the US Coast Guard for new vessels. The International Wood group will load cellulose fuel product for delivery overseas.

Freight Generators

Historically the Port of Port St. Joe has been the dominate freight generator for this FLZ. For many years, it housed the St. Joe Paper Mill and Box Plant, and the Arizona Chemical Company. However, since 1996 the Port hasn't seen any commercial activity until this year where they are moving some oyster shells. At the height of the Port's activity, in the 1950s, ships were entering and leaving the port on a weekly basis. Unfortunately, no documentation on the volume of freight transferred can be found, however the pieces of a successful port remain to bring life back to the port. Water, sewer, electricity and gas remain in place and the infrastructure is prime to bring in new business. When in operation, the Port utilized both truck and rail to move freight in and out of the Port. Other general freight generators inside the FLZ include the Apalachicola Regional Airport, the AN Rail line and Interstate 10. The Tallahassee International Airport is located outside the FLZ, but is in relatively the same geographical area.

There are two potential sites for an Intermodal Logistics Center (ILC) for this FLZ. The first site is located in Gadsden County. The site has both AN rail line and Interstate 10 frontage and once open would serve as a significant freight generator for the Region. This proposed site is in Phase III of the strategic site selection process, wherein landowner engagement is being sought. To date representatives for the landowners have issued a letter indicating that they would like to move forward with the ILC designation on their site. The second site is located in Gulf County, sometimes referred to as the "lay-down yard" throughout this document. This site has completed Phase I strategic site selection assessment and has good access to rail and connectivity to State Road (SR) 71 that then connects to Interstate 10 (I-10). Similarly, this site will be able to utilize the "Gulf Coast Parkway" when construction is completed. The Northwest Florida Transportation Corridor Authority serves eight counties including Gulf and Franklin in the FLZ. The Authority has several projects

planned including two options for a Gulf Coast Parkway. Although located just outside the FLZ to the west, the Gulf Coast Parkway will provide access from this Gulf ILC location and the Port of Port St. Joe to US 231 then north to connect to I-10. This allows for fast movement of freight to the west and north of the FLZ.

Other freight activity centers in the FLZ include Georgia Pacific and Rex Lumber along with other areas of freight activity that are identified as the logistics clusters in the FLZ.

Economic Development

The four rural counties within which the FLZ is located have access to a strong workforce, being surrounded by the Cities of Panama City, Marianna, and Tallahassee in Florida and Thomasville and Bainbridge in Georgia, which are less than an hour’s drive from potential development sites in the FLZ. The workforce in the four FLZ counties are augmented by a significant labor pool within typical driving home to workplace distances.

There are several workforce training programs across the North Florida region, including higher education programs, machinery operation training programs, and machinery repair and maintenance programs. Existing and evolving employer - WorkSource collaborations at the regional CareerSource centers are creating a new dynamic to ensure that new and growing employment centers can find the workforce needed.

The State of Florida and individual counties offer incentives of different types to help attract new businesses, and to help emerging tier 2 companies grow. Marketing outreach using state supported resources will place the region’s

strategic site assets on the world map. See Appendix A, Strategic Sites Inventory.

Infrastructure

The Gulf to Gadsden FLZ includes some of the primary pieces of the Strategic Intermodal System (SIS) which represents the State’s primary freight network:

- Emerging SIS Seaport: Port of Port St Joe
- SIS Railway Corridor: CSXT Railroad
- SIS Railway Connector: Apalachicola Northern (AN) Railroad
- SIS Highway Corridor: I-10
- SIS Waterway: Intracoastal Waterway

This freight network in the Gulf to Gadsden FLZ is serviced by roughly 35 miles of SIS roadways, over 120 miles of SIS Rail (35 miles of CSX, and 93 miles of Apalachicola Northern (AN) rail line), and nearly 95 miles of SIS Waterways, including the Gulf Intracoastal Waterway from Panama City Harbor to the City of Carrabelle to the west, and the Gulf Coastal Shipping Lane from the Anclote River to Apalachee Bay at Carrabelle to the east. These SIS facilities are supported by over 200 miles of regionally significant roads, including U.S. Highways; US 98, US 319, US 90, US 27 and State Roads; SR 71, SR 65, SR 20, SR 12, and SR 267.

INTRODUCTION

Gulf, Franklin, Liberty and Gadsden Counties have been working together to designate the Gulf to Gadsden Freight Logistics Zone (FLZ) in order to promote the planning and funding of infrastructure improvements, intermodal connectivity, and to facilitate freight activities and services within the region. The FLZ covers areas that have the potential to play a significant role in the generation of freight related activity and promote economic development competitiveness.

As part of the process to designate the Gulf to Gadsden FLZ, a Strategic Sites Inventory (SSI) project was conducted by Leotta Location and Design, (LL+D) in each of the four counties. The goal of the SSI project was to identify potential high quality industrial and commercial sites situated along or near key transportation assets in the area in order to market these sites for development of manufacturing and distribution projects that rely on multimodal transportation means for receiving process inputs and delivery of products to market. See Appendix A, Strategic Sites Inventory.

The SSI search was tailored to meet the specific needs of each county based on its location, natural resources, transportation assets, and economic interests:

- The SSI Phase I search for Gulf County was an expansion of a previous Duke Energy-funded SSI Phase I site search that was focused on identifying large contiguous tracts for heavy industrial project development. The target acreage for potential industrial sites was reduced from 200 acres from the initial study down to 25 acres. The goal was to identify any additional potential strategic sites for economic development beyond initial SSI Phase I site searches. Site searches were geographically constrained within a two-mile buffer along state and federal highway corridors and the Apalachicola

Northern Railroad and within a three-mile radius of the Port of Port St. Joe. Specific site search consideration was given to areas around the Port of Port St. Joe.

- The SSI Phase I search for Liberty County was conducted to identify potential strategic sites with particular attributes suitable for wood product manufacturing for both construction materials and utilization of wood waste byproduct repurposing. Site searches were geographically constrained within a two-mile buffer along SR 65 for direct connectivity to Interstate 10, the Apalachicola Northern Railroad and direct connectivity to both the Port of Port St. Joe and the Port of Panama City in neighboring Gulf and Bay Counties, respectively.
- The SSI Phase I search for Franklin County was also conducted to identify potential strategic sites with particular attributes suitable for wood product manufacturing for both construction materials and utilization of wood waste byproduct repurposing. Additionally, sites suitable for light manufacturing and aviation related light industrial and commercial operations were considered. Site searches were geographically constrained within a two-mile buffer along state and federal highway corridors and the Apalachicola Northern Railroad. Specific site search attention was given to areas around the Apalachicola Regional Airport. The capacity of the airport to accommodate cargo and rail access immediately to the north positions the airport as a strategic intermodal transportation asset.
- The SSI efforts in Gadsden County focused on landowner engagement for a site previously identified through a Duke Energy sponsored SSI Phase I project and a Phase II study recently conducted by LL+D. The objective was to provide incentives for the landowner to enter into an agreement with the Gadsden County Development Council to enable the site to be marketed for economic development.

The Strategic Plan

The FLZ Strategic Plan has been designed to meet the requirements listed in Section 311.103 (2), Florida Statutes, and serves as a framework to guide funding for freight infrastructure and freight projects identified in state, regional and local plans. It also serves stakeholders including local governments, economic development organizations, and private and non-profit groups working to create economic opportunities in the region. The Strategic Plan is intended to be maintained and updated periodically to reflect the needs of the local and regional freight-dependent economy with a continuing awareness of changing global trade policies and needs.

FREIGHT LOGISTICS ZONE

Section 311.103.1, F.S. defines “freight logistics zone” as “a grouping of activities and infrastructure associated with freight transportation and related services within a defined area around an intermodal logistics center, as defined in s. 311.101(2)”. As a key component of an FLZ, an “intermodal logistics center” is also defined as “a facility or group of facilities serving as a point of intermodal transfer of freight in a specific area physically separated from a seaport where activities relating to transport, logistics, goods distribution, consolidation, or value-added activities are carried out and whose activities and services are designed to support or be supported by conveyance or shipping through one or more seaports listed in s. 311.09.”

The Gulf to Gadsden FLZ has significant potential to become an important area for movement of goods in northwest Florida where local, regional and State officials have been working on plans to support and promote economic development competitiveness. The plans include redevelopment of the Port

of Port St Joe, improvements to the rail facilities, improvements to the Apalachicola Regional Airport, development of ILCs in Gulf and Gadsden Counties, and strategic sites inventories in all four counties to identify lands with potential for industrial and commercial development.

The location of current infrastructure and planned improvements is in a prime location between the larger Ports of Jacksonville and Pensacola, both more than a three-hour drive away. The Port of Panama City is also about 40 miles to the west, however, the Port of Port St. Joe could provide service and help ease a congested port and be a valuable third port asset on the Northwest Florida Gulf Coast.

The location of the potential ILCs serve regional goals of growth and connectivity and provide the multimodal service required for a successful freight industry network. Each potential ILC location has convenient access to a Regional Significant Road according to the Apalachee Regional Planning Council’s Strategic Regional Policy Plan (SRPP). The ILC in Gulf County has connectivity to SR 71, a north/south road that intersects I-10, an east/west highway and part of the Florida Department of Transportation (FDOT)’s Strategic Intermodal System (SIS). SR 71 continues north where it changes to SR 53 in Alabama and has connections to many other highways in Dothan, AL. The ILC location in Gadsden County has almost direct access to I-10 from the site, allowing for an easier movement of freight by truck. The additional freight industries that would be added by the designation of an FLZ are important assets for local economic growth and the financial stability of the region.

THE STUDY AREA

The study area to define the FLZ comprised of all of Gulf, Franklin, Liberty, and Gadsden Counties. Particular attention was made to the areas that were key generators of freight activity and the transportation network that serves freight traffic in the Region. Due to the rural nature of the region, points outside of the above four counties were considered as areas of freight activity, but only as possible tributaries to the FLZ. While the FLZ boundaries remain only within the four-county region the wider north Florida area is considered throughout this Strategic Plan. For the purpose of this Strategic Plan, the major assets included within the FLZ include: The Port of Port St. Joe, the Apalachicola Regional Airport, the Apalachicola Northern Rail line, the CSX Rail line, Interstate 10, and Gulf Intracoastal Waterway. As indicated previously, there are two potential ILC locations that were considered: one in Gulf County just outside the City of Port St. Joe, the other in the City of Gretna, in Gadsden County. Other important assets outside the study area include the Tallahassee International Airport, the Port of Panama City, and US 231.

FREIGHT MOVEMENT IN THE AREA

The Gulf to Gadsden FLZ has significant potential to become a prime corridor to move freight across the state and nation. Located between the Port of Tampa Bay to the southeast and the Ports of Panama City and Pensacola to the west, the FLZ serves as a centralized location to receive freight and move it in a northerly direction across the nation. Located within close proximity to the regional transportation network, the Gulf to Gadsden FLZ has access to the Intracoastal Waterway, rail access and SIS roadways throughout the Region. The economic impact to the Region would be significant, including the direct and indirect employment generated by the resurgence of the Port.

As the existing conditions are examined in the region, it can be seen that there is a significant amount of freight being shipped to and from and throughout this four-county region by truck. Looking at Gulf, Franklin, Liberty, and Gadsden Counties’ top five freight movers, these four counties combined import over 700,000 truck

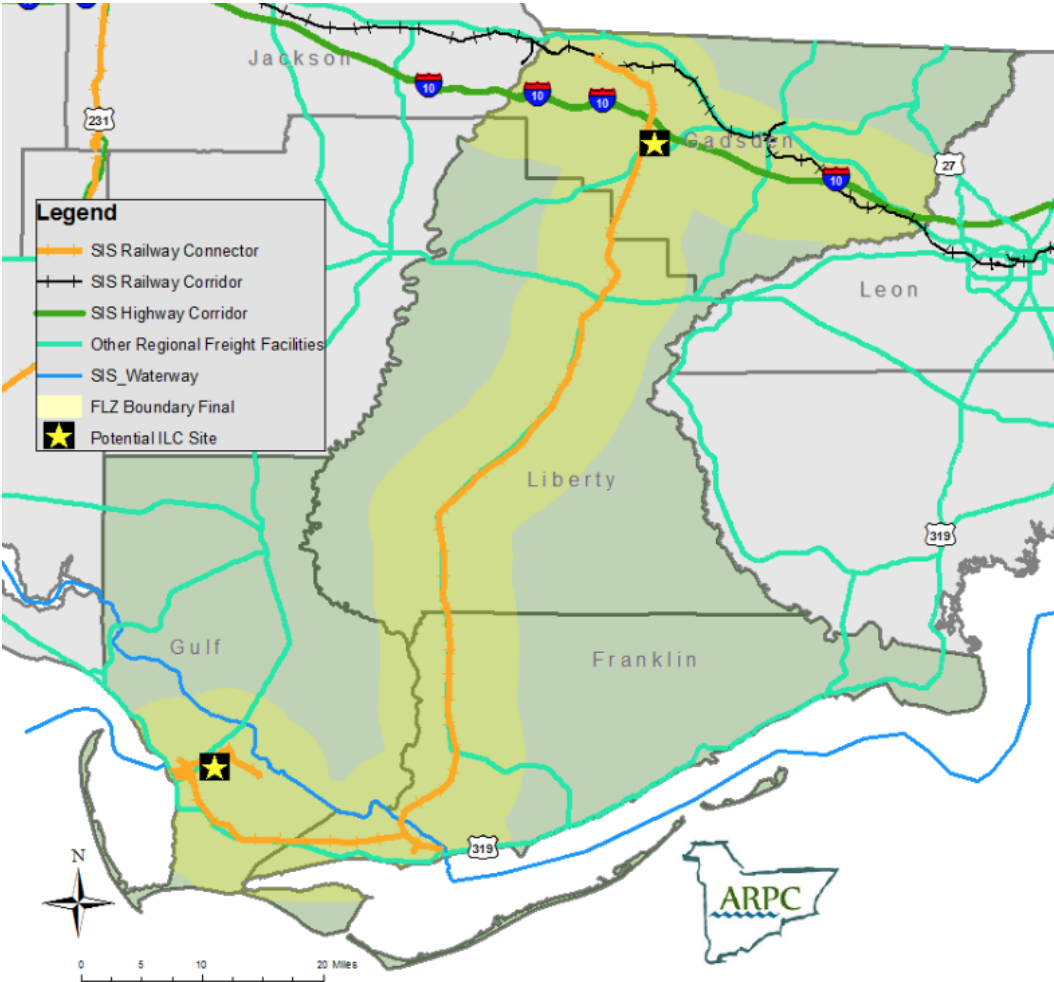


Figure 2. Existing Freight Infrastructure in the FLZ Region.

tons of freight and export nearly 1.5 million truck tons of freight per year (Source: FDOT District Three Freight and Logistics Overview, August 2014). This freight is produced by a small rural corridor in northern Florida that is without a fully functioning rail system and seaport. The addition of which would have exponential impact on freight movement on the system.

The FLZ's location along the AN Rail line serves a strategic use whereby the Rail encompasses each of the four counties, starting at the Port of Port St. Joe, extending eastward to Apalachicola near the Apalachicola Regional Airport, then north through Apalachicola near the Apalachicola Regional Airport, north through Liberty County, running close to lumber mills, and into Gadsden County where it connects to the CSX mainline running east and west. As it also crosses I-10, the potential for multimodal transfer will allow freight to be easily shipped throughout North America. The Gulf to Gadsden FLZ is strategically located on the north gulf coast of Florida. With the widening of the Panama Canal, the FLZ would provide ships with another option for a port in north Florida thus reducing travel time for ships having to go up the Atlantic Coast and reducing fuel costs for truck freight having to travel the length of the Peninsula to move Freight across state lines.

The Port of Port St. Joe received its last ship in the mid 1990's. Subsequent relocations of the offices of the Port Manager and the Port Authority resulted in loss of paper records that would attest to the historical tonnage in and out of the Port and the component of that tonnage transferred to the AN Railroad. However, as the transportation network has been retained, the FLZ is primed to make significant contributions to freight movement in the region with most of the infrastructure already in place. When rail and bulkhead repairs and requisite dredging are completed the Port, rail, and road systems can again contribute to the regional economy.



Figure 3. Comparison of Maritime Travel Distances From the Panama Canal to Southeastern US Port Facilities.

POTENTIAL INTERMODAL LOGISTIC CENTERS

The Gulf to Gadsden FLZ will be served by two Intermodal Logistics Centers (ILCs). The term ILC includes, but is not limited to, an “inland port.” An ILC is a facility or group of facilities serving as a point of intermodal transfer of freight in a specific area, physically separated from a seaport, where activities relating to transport, logistics, goods distribution, consolidation, or value-added activities are carried out and whose activities and services are designed to support or be supported by conveyance or shipping through one or more seaports listed in Section 311.09, F.S.

The potential ILCs in Gulf and Gadsden County were evaluated as part of LL+D’s Strategic Sites Inventory previously described. The potential ILCs will be designed to support or be supported by conveyance or shipping through the Port of Port St Joe.

• Potential Gulf County Intermodal Logistics Center

As described earlier, Leotta Location and Design’s Strategic Sites Inventory in Gulf County was focused within a two-mile buffer along state and federal highway corridors and the Apalachicola Northern Railroad and within a 3-mile radius of the Port of Port St. Joe. One of the sites identified through the SSI process as being a potential ILC.

The approximately 116-acres site is located on SR 71, near the city limits of the City of Port St. Joe. A rail spur runs adjacent to the southwestern portion of the site. Transmission lines run east and west adjacent to the southern border of the site. According to the Gulf County Property Appraiser’s data, the site is composed of three land parcels owned by St Joe Land and Development Company and Apalachicola Northern Railroad. The site contains approximately 66 acres of non-hydric soils, with the remaining 50 acres containing various

levels of hydric soils. The site contains 60.5 acres of wetlands according to the National Wetlands Inventory (NWI). FEMA’s Preliminary D-FIRM flood data displays 14.7 acres of flood zone A within the site.

The existing land use of the potential ILC site is NO AG ACRE, which in the property appraiser’s lexicon, designates large tracts with no agricultural exemption. The actual use is timberlands. The future land use designation on the Gulf County Future Land Use Map is Agriculture. The future land use map designation of the site would need to be amended to allow development of the potential ILC site. Access to the site may include the construction of



Figure 4. Potential Site of Gulf Co. Intermodal Logistics Center Site.

turning lanes on SR 71 and a spur from the AN Railroad. Required improvements to provide utilities to the site will need to be identified. The property being considered is listed under three separate ownership parcels, two of which are the Apalachicola Northern Railroad; the third is the St Joseph Land & Development Company.

The potential ILC in Gulf County will serve a strategic state interest increasing economic activity in the region, facilitate cost-effective and efficient movement of goods from and to the Port of Port St Joe, and interact with and support the transportation network. Interest in the development of the site as a laydown yard has been expressed by Genesee and Wyoming, Inc.

- ### Potential Gadsden County Intermodal Logistics Center

As part of economic development initiatives in Gadsden County, the Gadsden County Development Council has been working with Leotta Location and Design to create a Strategic Sites Inventory of high quality raw land sites for industrial and commercial projects. Twenty large acreage sites ranging in size from 200 to 1,500 acres were initially identified and evaluated by the consultants in the SSI Phase I assessment process. Six of these sites were subject to further evaluation after passing stringent suitability modeling conducted in the SSI Phase II study process. These sites are proximate to Florida's Strategic Intermodal System (SIS) assets such as interstate, four-lane highways, rail, and ports. Gadsden County has now focused on one of these sites to be developed as an ILC and has been further evaluated in the SSI Phase III process.

The potential Gadsden County ILC contains approximately 570 acres and is strategically located in the City of Gretna adjacent to I-10 and is accessible from CR 270 (Tolar White Road). The site is located four road miles from I-10

via CR 270 and SR 12. At present, the CR 270 right of way is inadequate both in width of structural base and in its intersection with SR 12, these improvements or alternate access need to be programmed.

The potential Gadsden ILC site is approximately 1,800 feet east of an Apalachicola Northern (AN) short line railroad that would connect the site to the Port of Port St Joe and the AN with the CSX tracks in Chattahoochee, FL. In order to access the AN rail line, a spur would need to be constructed on the east side of the mainline track. The land adjacent to the site providing rail access is under different ownership than the focus site. Construction of a spur would require an agreement with the landowner of the adjacent 51.19 acre to provide site access to the rail. In addition, an at grade crossing of CR 270 will need to be constructed.

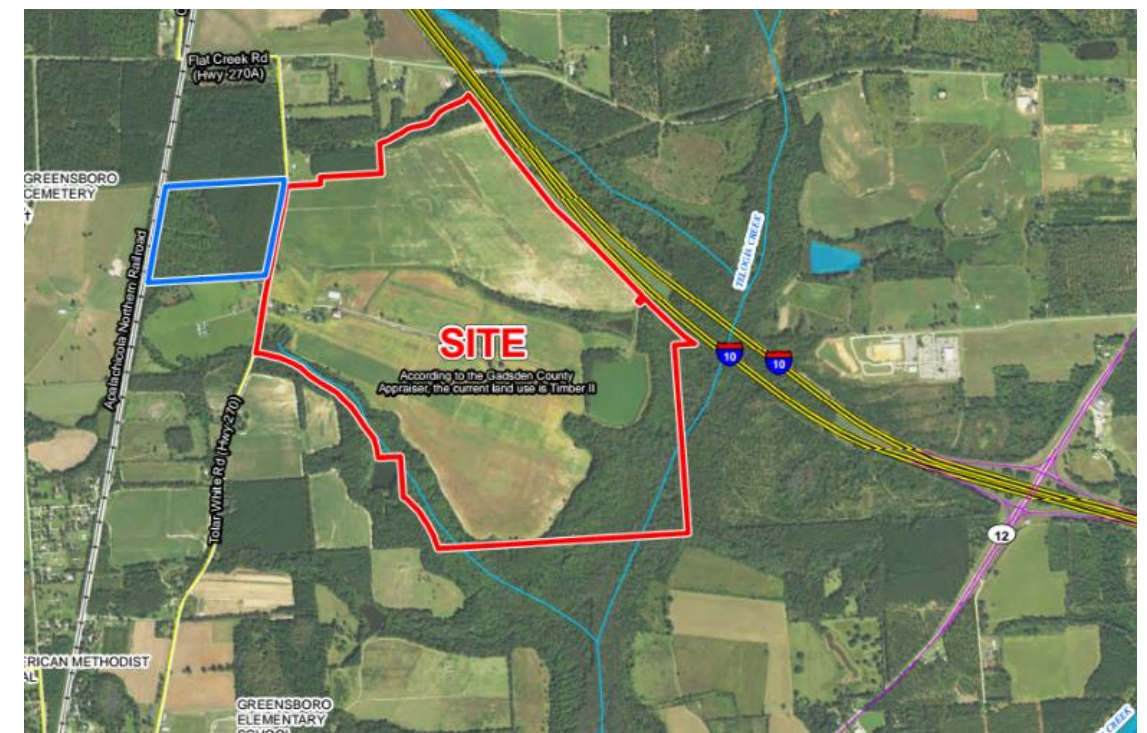


Figure. 5 Potential Gadsden County Intermodal Logistics Center Site

According to the consultant's report, approximately 119.33 acres of the site is in Flood Zone A, and 449.58 acres of the site is in Flood Zone X. Flood Zone A includes areas subject to inundation by the one-percent-annual-chance flood event with no base flood elevations determined. Flood Zone X includes the areas of minimal flood hazard, which are the areas outside the Special Flood Hazard Area and higher than the elevation of the 0.2-percent-annual-chance flood.

Due to the large area in Flood Zone X, no additional fill is anticipated to be needed to meet floodplain construction standards. Although the majority of the site is at minimal flood risk, an hydraulic analysis should be conducted to meet permitting requirements, reducing the potential for flood damage and to ensure proper drainage on-site.

The existing land use of the potential ILC site is agriculture. Gretna's Future Land Use Map (FLUM) designation on the site is Mixed Use. For the site's FLUM designation to be consistent with the potential uses of the ILC development Gretna's FLUM designation on the site will have to be amended from Mixed Use to Business / Industrial. Required improvements to provide utilities to the site have been identified and the cost of site improvements has been estimated.

It is understood that the City of Gretna would provide the piped utilities. The site is located approximately four miles north of the Florida Gas Transmission Right of Way (ROW) and discussions concerning a gas supply spur are underway. The I-10 ROW contains a major east-west Internet Fiber easement, although there is not currently a local internet point of presence.

The potential Gadsden ILC will serve a strategic state interest of increasing economic activity in the region, facilitating cost-effective and efficient movement of goods from and to the Port of Port St Joe, and interacting with

and supporting the transportation network including the Apalachicola Regional Airport and the Tallahassee International Airport. This Airport, designated "TLH" is currently in the process of establishing a Foreign Trade Zone (FTZ).

Interest in the development of the site includes New Moon Farms LLC, owners of the potential ILC site, who have been working with the owners of the adjacent 53 acres of Clara Farms, Inc. and have received a conceptual rail layout from Genesee & Wyoming, Inc., which operates the entire AN rail line, to provide rail connections to the site.



Figure 6. Proposed AN Rail link to Gadsden ILC

Source: Genesee & Wyoming RR,

The owners of the potential ILC site are working on a conceptual master plan for the property and the establishment of an agreement with the Gadsden County Development Council to market the site, conduct due diligence and seek environmental permits (please see letter from New Moon Farms LLC, in Appendix D, Supporting Data).

Genesee and Wyoming has performed initial engineering geometry studies on a siding and spur construction to serve the Gadsden ILC site as shown above.

LOGISTICS CLUSTERS

Freight activity can be seen in pockets throughout the Gulf to Gadsden FLZ. Freight-orientated businesses are largely involved with the movement of Lumber, Chemicals, Non-Metallic Minerals, and some food products from the coastal counties. These businesses can be seen as having close proximity to the port and rail systems.

The Phase I Strategic Site Inventory analysis identified potential sites for development. With the help of local stakeholders, the SSI report highlights potential sites with the highest potential and best use for development. Many of these sites were found along the AN rail line as shown in the detailed County Maps in Appendix C.

This Appendix C map series also indicates the location of existing Industrial and commercial land uses as adopted in the four counties' future land use maps.

Figure 7 below shows the heavy truck traffic volume. As can be seen, much of the freight traffic by truck is on the SIS system. Freight remains spotty throughout the zone since the port and rail ceased operation. However, with the emergence of potential sites and the rehabilitation of infrastructure, this Region has the potential to have many pockets of Freight Activity Centers or Logistics Clusters in the coming years.

STAKEHOLDER COORDINATION

Gulf, Franklin, Liberty and Gadsden Counties have joined together in partnership to designate the Gulf to Gadsden Freight Logistics Zone (FLZ). The counties have worked closely with the FDOT District One and District Three offices as well as the Capital Region Transportation Planning Agency to organize and facilitate the improvements of the local freight transportation network to improve intermodal connectivity. A wide variety of agencies, jurisdictions, and other stakeholders with responsibility for local and regional freight transportation and economic development were engaged in the FLZ planning process. Presentations delivered at stakeholder summits are included in Appendix B.

The FLZ Strategic Plan was developed in coordination with the following agency stakeholders:

State Agencies

- FDOT District One
- FDOT District Three
- Enterprise Florida

Local Governments

- Gulf County
- Franklin County
- Liberty County
- Gadsden County
- City of Port St Joe
- City of Gretna
- City of Chattahoochee

Regional Agencies

- Opportunity Florida
- Florida’s Great Northwest
- CareerSource Gulf County
- CareerSource Chipola
- CareerSource Capital Region
- Capital Region Transportation Planning Agency
- Apalachee Regional Planning Council

Economic Development Organizations

- Opportunity Florida
- Apalachee Regional Planning Council
- Gadsden County Economic Development Council
- Liberty County Chamber of Commerce
- Franklin County Chamber of Commerce
- Port of Port St. Joe Port Authority
- Gulf County Economic Development Coalition
- Tallahassee Community College Workforce Development

Coordination has been important to identify infrastructure needs in the study area to support freight movement. The various agencies charged with transportation planning at the state and local levels provided lists of cost feasible projects and unfunded needs that comprise the future improvements in the FLZ, including those with and without identified funding sources. These provided the inputs for the Strategic Infrastructure Improvements Element discussed on page 38.

THE FREIGHT LOGISTICS ZONE

The Freight Logistics Zone can be seen in Figure 1 highlighted in yellow. The FLZ's primary function revolves around freight, freight generators, and freight movements. Therefore, the FLZ is focused on the Port of Port St Joe, the Genesee & Wyoming AN rail corridor and existing and potential Industrial / commercial sites adjacent or near the AN line, the Apalachicola Regional Airport and also the all-important I-10 corridor. The initial FLZ boundary includes the identified important generators, break/bulk sites, and destinations. The FLZ currently encompasses all relevant freight activity and provides room for future freight-dependent uses. The boundaries of the FLZ are defined by a five-mile offset from the center of the predominant freight movers within the Region.

The first component of the zone starts at the Port of Port St. Joe. The Apalachicola Northern rail line is buffered by a five-mile boundary all the way into Gadsden County where it connects to the CSX line in Chattahoochee. This component encompasses the Apalachicola Regional Airport and the majority of the sites identified in the SSI process for Gulf, Franklin, and Liberty Counties, as well as both potential ILC sites.

The second component of the FLZ is included in a five-mile buffer that extends along the I-10 corridor in Gadsden County. As the only SIS roadway identified by FDOT within the four-county study area, I-10 is an important component to the overall movement of freight in and out of the Region in an east-west direction. The five-mile boundary includes within it the potential ILC in Gadsden County as well as the existing US90/I-10 interchange which is heavily used by truck freight. The I-10 component also encompasses the entirety of the CSX rail line in Gadsden County, another SIS facility designated by FDOT and also encompasses nearly all of the strategic sites that were listed with the

exception of few in north Gulf County and one or two in Gadsden County. This delineated FLZ boundary also includes many of the parcels with FLUM designations as future industrial land uses as can be seen in the individual county's maps in Appendix C. While some sections of the delineated FLZ are undevelopable, (national/state forests, etc.), it is still an area that physically connects the Logistics Clusters and connects to the potential ILC and is, therefore, part of freight development in the future.

EXISTING TRANSPORTATION INFRASTRUCTURE

Highways

The FDOT Strategic Intermodal System (SIS) represents the core of the freight network statewide. FDOT District 3, in coordination with local governments in the District, has identified the regional freight network which includes the SIS highways, rail lines, other state highways, SIS airports, SIS seaports, military installations and general aviation airports. Figure 7 shows the freight network within the FLZ along with daily truck volume and primary components of the SIS:

Emerging SIS Seaport: Port of Port St. Joe

SIS Railway Corridor: CSXT Railroad

SIS Railway Connector: Apalachicola Northern (AN) Railroad

SIS Highway Corridor: I-10

SIS Waterway: Intracoastal Waterway

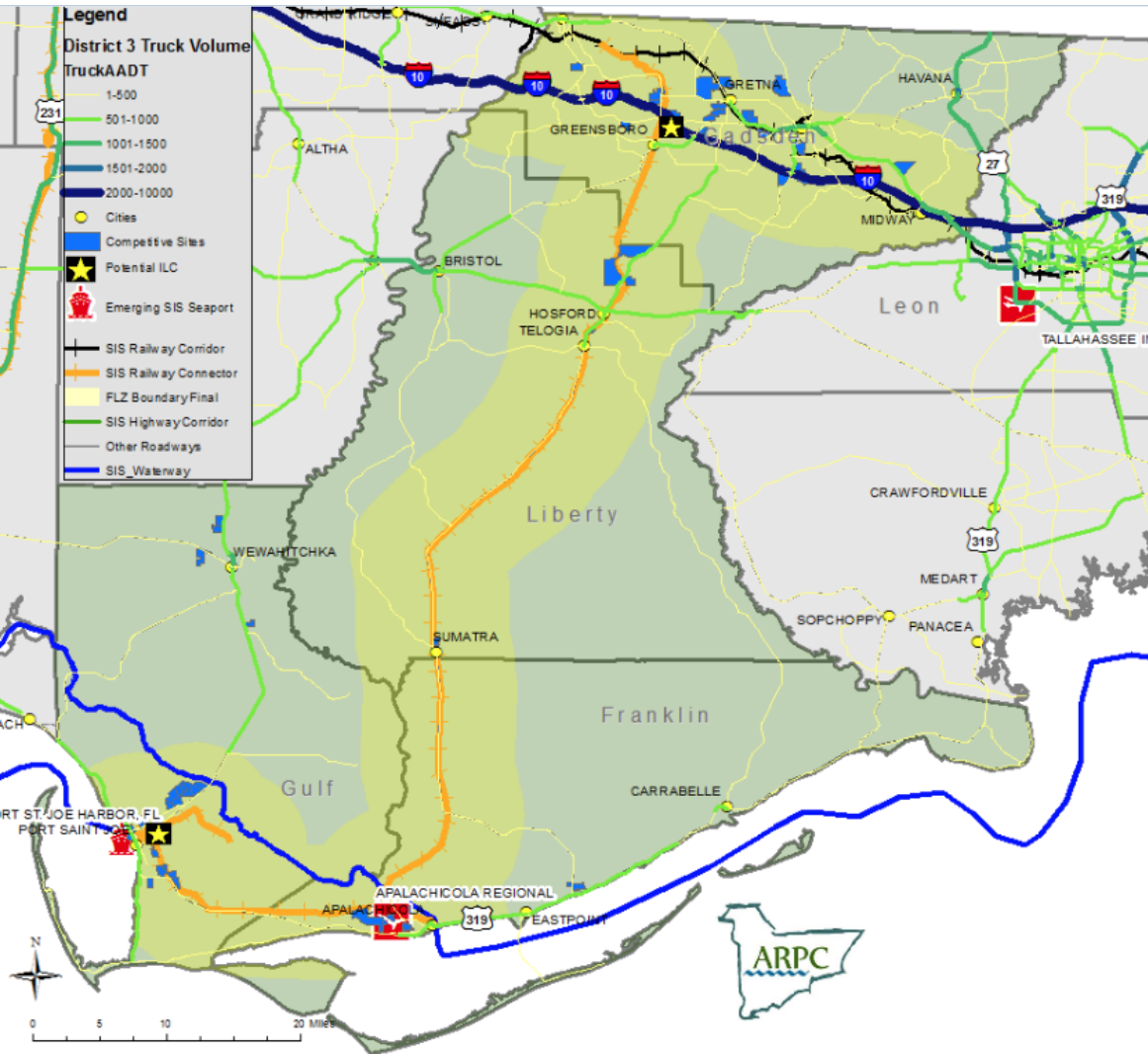


Figure 7. Truck Trip Volumes – Average Annual Daily Trips
Source: FDOT District Three Shape file

The Port of Port St. Joe

The Port of Port St. Joe is located within the limits of the City of Port St. Joe, in proximity to an expanding regional intermodal transportation system that serves northern Florida and the neighboring states in the southeastern U.S. The strategic location of the port facilitates domestic and international commerce with other Florida markets and with the U.S. southeast and mid-west regions. The 2013 update of the Port of Port St. Joe Master Plan identified the Port Planning Area (PPA) shown in Figure 7. The site is currently undeveloped; however, as stated earlier the Port has a long history of industrial and commercial shipping activity.

The PPA has considerable infrastructure in place that will be beneficial to the development of the Port. This includes over twenty-five hundred feet of bulkhead on St Joseph Bay, nearly nine hundred feet of bulkhead on the Gulf County Canal, and rail access via the AN Railway. Due to the closure of historically important paper and chemical plants the sites contained within the PPA have significant excess capacity for redevelopment plans, some of which is currently underway. For example, the Port Authority has the necessary state and federal permits to proceed with the dredging of the channel and an agreement is in place with the U.S. Army Corps of Engineers to work on the dredging needed to accommodate shipping vessels. Engineering and design of spoil sites are being completed. Funding for the dredging is estimated at \$50 million; the FDOT has a commitment to provide a 75% match for the project based on job creation at the Port. Additional funding is needed for the dredging and rail improvements.

The intermodal assets within the FLZ allow convenient connections between the Port of Port St. Joe, the Apalachicola Regional Airport, and I-10 via the AN Railroad and the CSXT Railroad corridors, as well as the Gulf of Mexico and locations within the region's Intracoastal Waterway. The Port Authority and FDOT District 3 are cooperating to be certain that freight interests are



Figure 8. Port of Port St. Joe and Interconnected Opportunities

considered in the planning of the proposed Gulf Coast Parkway, which will connect US 98 which passes along the coastline of Gulf County and through the Port area, with US 231 north of Panama City. This limited access highway will become the Port's primary route for highway freight movements inland and will be the shortest route to I-10. Other roadways providing access to the Port and vicinity are US 98 (SR 30), SR 71, and CR 382. Significant utilities infrastructural improvements were made to accommodate the Port's prior

uses, which included the St. Joe Paper Mill, Arizona Chemical and other industries that required significant electric power, natural gas, water, and wastewater treatment capacities. These capacities still exist today and are ready to be re-utilized by new port occupants.

Intracoastal Waterway

The Port's location at the junction of St. Joseph Bay and the Gulf County Canal make it a critical part of the intermodal transportation infrastructure within the FLZ and is part of the Gulf Intracoastal Waterway, which provides connections to the nation's Intracoastal Waterway. A majority of the Waterway provides partial to total protection from Cape Coral Florida to Brownsville, Texas with connections to inland waterways at Apalachicola, Pensacola and New Orleans.



Figure 9. Intracoastal and Inland Waterways.
Source: Port of Port St Joe Master Plan, 2013

Rail Facilities

The Apalachicola Northern (AN) Railway is a 96-mile Class 3 railroad owned by The St. Joe Company and operated by Genesee & Wyoming, Inc. (G&W). The AN connects the Port with the Class 1 CSX Railroad at Chattahoochee in Gadsden County. The AN is currently only active from Chattahoochee south to Telogia in Liberty County. The rail is out of service approx. 40 miles south of Telogia and significant repair to the Apalachicola River bridge is needed before it is possible for rail to resume service to Port St. Joe. Funds for most of the repairs have been budgeted by FDOT, G&W and The St. Joe Company. Per Joe Arbona of Genesee & Wyoming, the AN's operating company, repairs are required for multiple bridges in Liberty County in addition to the overhaul of the Apalachicola River Bridge.

Once the Port Authority has a firm commitment from a customer, which can justify the release of the funds needed to make repairs, it would take 18-24 months to complete the required rehabilitation of the track. Officials at G&W have suggested that transloading is a viable option for customers further south of Telogia in Liberty County while the AN is further assessed and repaired. Transloading is the process by which the bulk product goes as far south as possible by rail and is then trucked the rest of the way to its destination. G&W has offered to help customers and curb costs of repairing the lines until it becomes economically feasible to do so. One of the sites evaluated in the SSI process is a site that has been used by G&W for this purpose.

Historically, the AN carried pulp timber from timberlands in the region to the St. Joe Paper Mill which was located directly on the waterfront of St. Joseph Bay. Finished card and paper products were then shipped to maritime destinations or hauled by rail to clients across the Eastern US. Figure 9 depicts

the CSX and Norfolk Southern systems and their connections to the western states, with the grey lines depicting the short line feeders, including the AN.

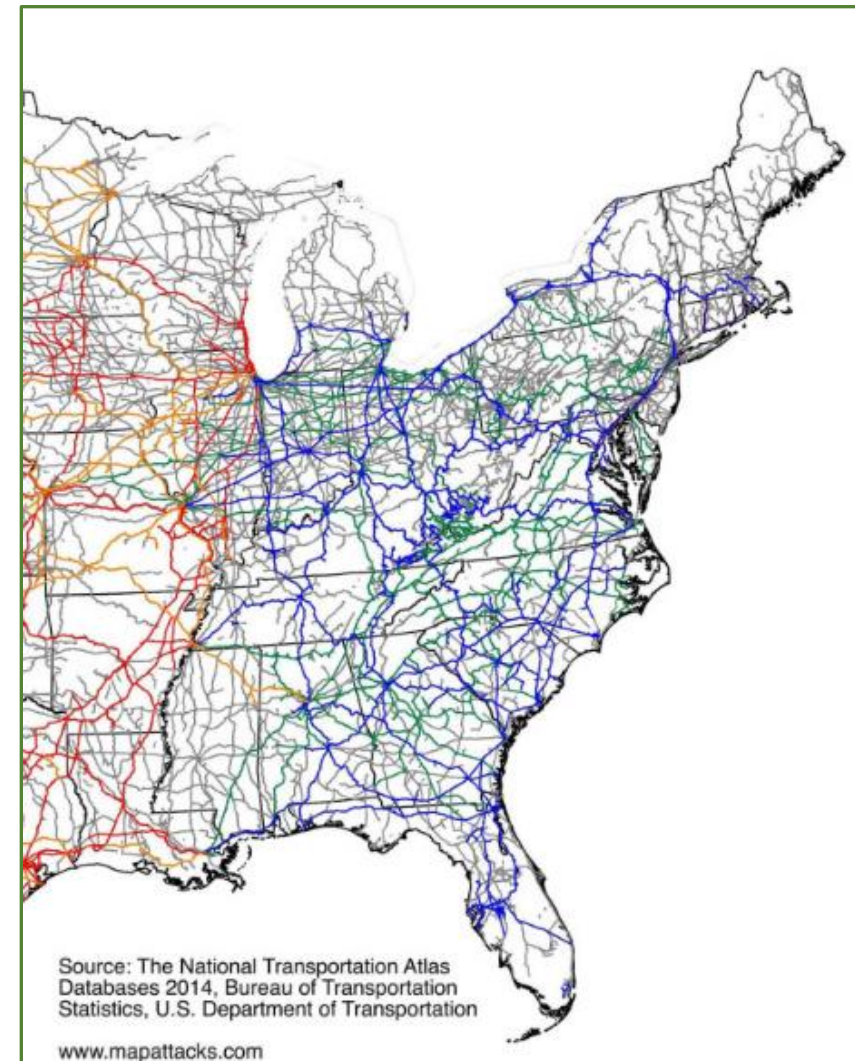


Figure 10. Rail Connections Via the CSX and Norfolk Southern Lines

Airports

The existing freight network serving the Freight Logistics Zone includes the Apalachicola Regional Airport, located in Franklin County, approximately two miles west of Apalachicola, and the Tallahassee International Airport, located near the FLZ on the Southwest corner of the City's Capital Circle and heavy truck by-pass.



Figure 11. Aerial of Apalachicola Airport

Besides these two airports with seven days per week, fixed-base operator provided services, the area has smaller general aviation airports capable of light duty deliveries and business class aircraft with ready access to potential development sites. These are:

Quincy Municipal Airport – 2J9

Calhoun County Airport – F95

Costin Airport (Port St Joe) – A51

- Apalachicola Regional Airport – Cleve Randolph Field (AAF)

The AAF is currently used for general aviation by FAA and FDOT. The airport has three concrete runways at different angles, each one-mile long, which enables landing in almost any direction of cross wind. There is also an 11,500 sq. foot corporate hangar capable of holding several aircrafts that is leased to businesses. The airport is currently underutilized and Franklin County is working with consultants on developing strategies to position the airport to attract businesses. A copy of the study prepared by engineering consultants BRPH is attached as Appendix D.

- Tallahassee International Airport – TLH

The Tallahassee International Airport is currently proposing a Foreign Trade Zone (FTZ) which would include Leon, Madison, Gadsden, Liberty, Franklin, Wakulla, Jefferson and Taylor Counties. The proposed Foreign Trade Zone overlaps the Freight Logistics Zone in Gadsden, Liberty, and Franklin Counties. A feasibility study has already been completed and approval of the new FTZ is expected by 2018. Referring to Figure 12, the consultants have recommended including those areas labeled B, C and D, which total 244 acres, as the Airport

Magnet Site, which will provide opportunities to locate maintenance repair and overhaul, aviation related logistics or manufacturing companies, and industrial development space for other industry sectors that require close proximity to the Airport infrastructure.

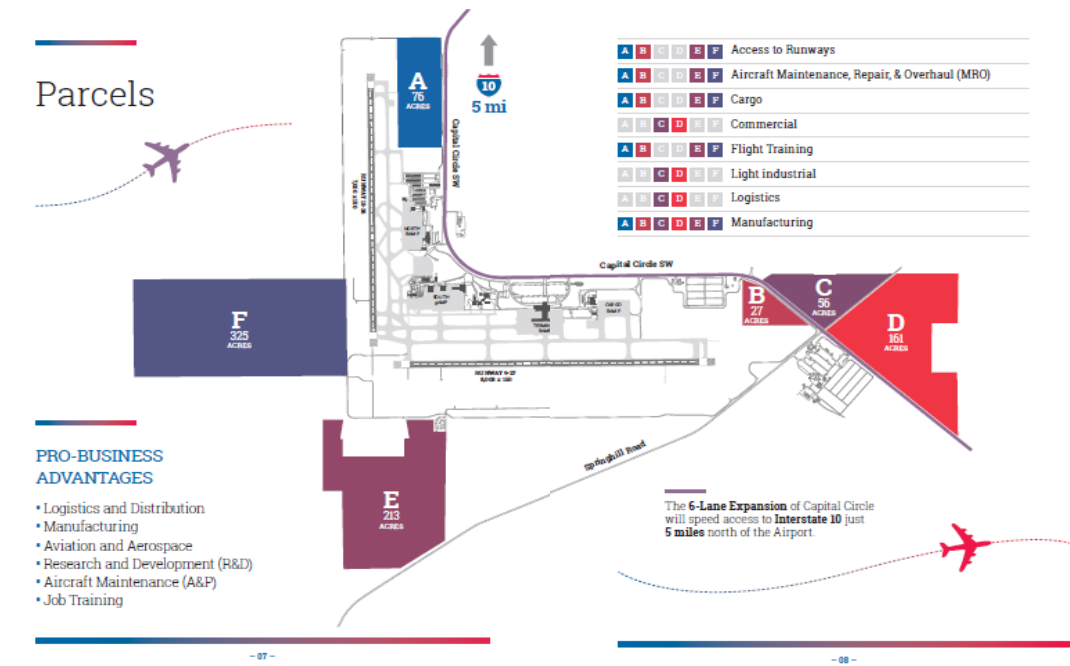


Figure 12. Proposed FTZ Improvements at TLH
Source: IMS Worldwide, Inc., Tallahassee International Airport FTZ Study, 2014

Planned Freight Infrastructure Projects

The planned infrastructure projects needed to support the regional freight network and FLZ were identified based on several sources:

- The FDOT Freight Mobility and Trade Plan (FMTP), provides the state with an integrated and comprehensive plan to focus on objectives and strategies to benefit the movement of goods, compiling the needs identified in the FDOT district and local needs plans.
- The FDOT Strategic Intermodal System (SIS) long range plan, identifies the cost feasible and unfunded needs for the high priority, state designated system.
- The Capital Region Transportation Planning Agency (CRTPA) Metropolitan Planning Organization (MPO) long range transportation plan (Gadsden County only), for identification of unfunded needs and long range cost-feasible projects.
- Emerging or other improvement needs that have not been formally included in existing plans, but are known to relevant stakeholders.

FDOT FMTP:

- Gulf to Bay Highway (High Priority) is essentially a relocation of US 98 away from higher density beach housing into a four-lane divided coastal property by-pass.

FDOT SIS:

- SR 8 (I-10) from West of SR 10 (US 98) to Ochlocknee River Bridge: Project Development & Environment (PD&E; SIS First Five Year Plan)
- SR 8 (I-10) from West of SR 10 (US 98) to Ochlocknee River Bridge: PD&E (SIS Second Five Year Plan)
- SR 8 (I-10) from West of SR 10 (US 98) to Ochlocknee River Bridge: PD&E (SIS Cost Feasible Plan 2024-2040)

The CRTPA:

- The Capital Region Transportation Planning Agency (CRTPA) maintains the Regional Mobility Long Range Transportation Plan projects list for Gadsden County. Based on that list, the following projects would affect freight mobility within the FLZ.

TABLE 1. CRTPA Projects

Project Name	Estimated Cost
Quincy Bypass (South)	\$ 10,763,639
City of Midway Access Road	\$ 6,011,954
Main St Bypass - Havana	\$ 11,475,605
Washington St Bypass - Chattahoochee	\$ 13,496,346
Quincy Bypass (North)	\$ 9,285,232

Other Improvements:

- Gulf Coast Parkway PD&E Study. Upon finalization of route selection, the Parkway would enable a direct connection to US 231 that circumvents Tyndall Air Force Base (AFB).
- Dredging the Port of Port St. Joe Channel, turning basin and Gulf County Canal.
- Rehabilitation of the AN rail line in and south of Liberty County, including trestles and the Apalachicola River Bridge. FDOT’s Five Year Program also includes rail improvement projects, including an \$8M project in FY 2018-2019 to increase the capacity of the AN rail line, which relies on \$1M from The St. Joe Company and another \$1M from Genesee & Wyoming, Inc. The project includes repairs to two bridges, primarily to reconstruct a bridge that burned several years ago that is approximately four miles south of CR 65 and between the two branches of the St. Marks River. The line will also require repairs to the swing span bridge across the Apalachicola River, north of the City of Apalachicola.

Figure 13 depicts several of the projects in the eastern range of the Northwest Florida Transportation Corridor Authority’s jurisdiction. Of interest to this project are those labeled 25, 26 and 27. Either route 25 or 26 is intended to be a by-pass around Tyndall AFB, a congested, slow speed limit zone that, when completed, would provide faster access to US 231 and points north by truck. Also, planned is the project labeled 27, the Gulf Coast Highway.



Figure 13. Portion of the Northwest Florida Corridor Authority Project Area

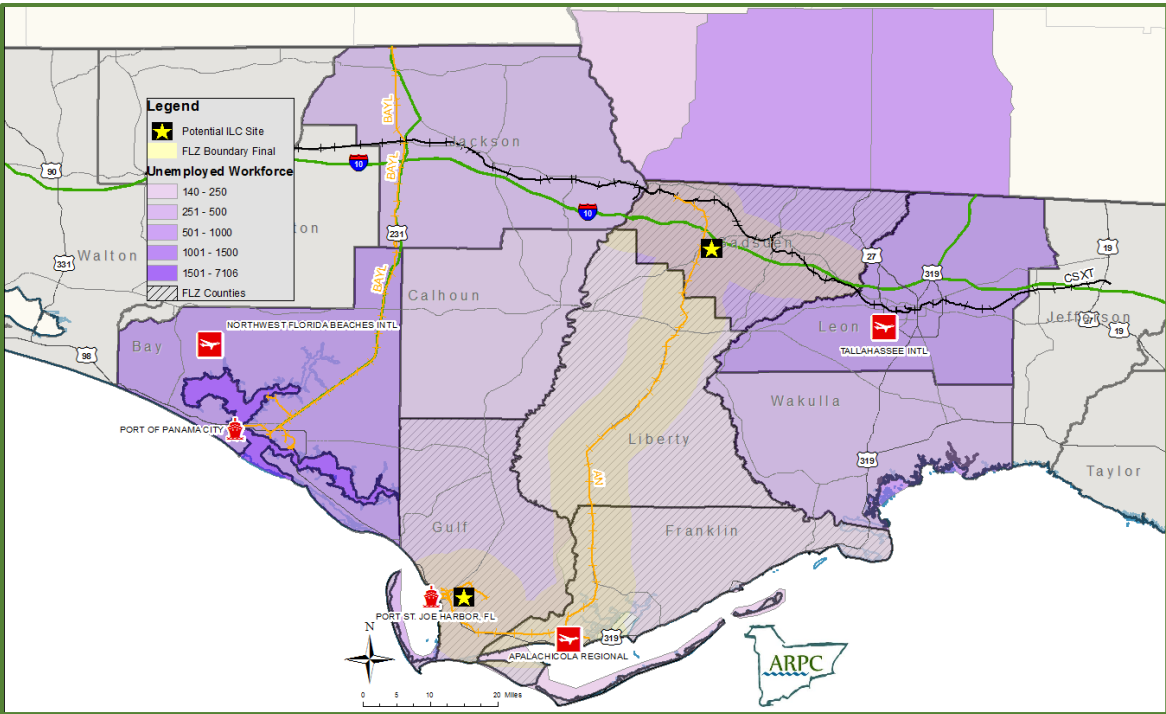


Figure 14. Unemployed Workforce Availability
Source: ARPC GIS Dept.

Workforce Availability

Data from the US Census Bureau’s American Community Survey was utilized to identify workforce availability within the FLZ and the region. Labor force and unemployment statistics were obtained from the Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, and the Georgia Department of Labor, Workforce Statistics & Economic Research.

The four counties within the FLZ have a combined workforce of approximately 32,000. With Panama City, Marianna, Tallahassee, Florida and Thomasville and Bainbridge, Georgia, which are less than an hour’s drive away, the region’s workforce increases to more than 330,000. Appendix D includes a description of the demographics in the FLZ, a comparison of each of the counties within the FLZ to drivedhed data and detailed information about who works in each county within the FLZ.

Table 2. Workforce Availability (# of Workers)

Counties	Freight Related	Unemployed
Gulf	595	257
Franklin	349	204
Liberty	319	140
Gadsden	1,582	1,134
FLZ Total	2,845	1,735
Bay	8,917	4,294
Jackson	1,565	908
Calhoun	470	282
Leon	7,933	7,106
Wakulla	1,531	593
Seminole, Ga	539	247
Decatur, Ga	1,913	727
Grady, Ga.	1,724	581
Contributing Counties Total	27,437	16,428
TOTAL	30,282	18,208

Source: American Community Survey

The two primary sectors of workforce data used in the above analysis, provided in Table 2, are freight-related workforce and unemployed workforce. The identified freight-related workforce sectors include mining/extraction, manufacturing, wholesale trade, and transportation/warehousing.

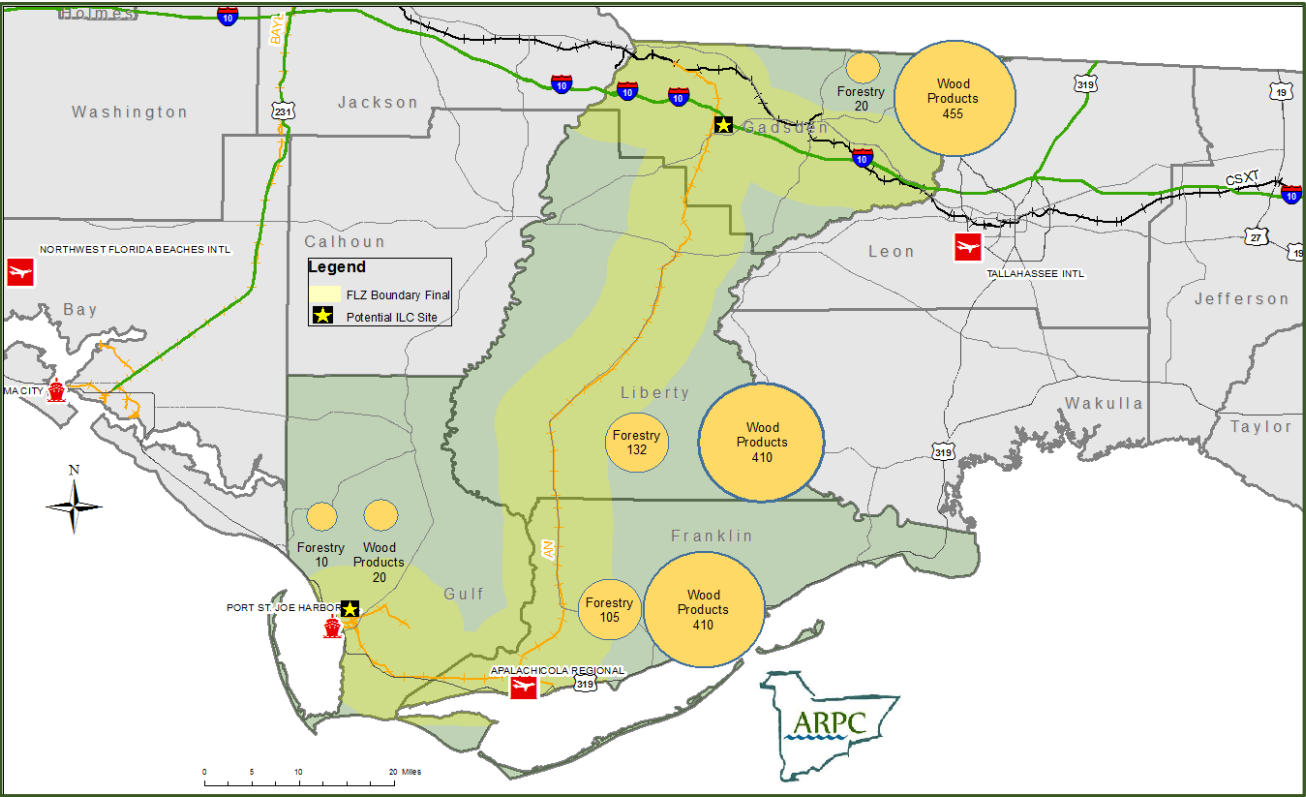


Figure 15. Logistics Forestry and Wood Products Employment Clusters
Source: Economic Development Administration, Cluster Tools

The analysis in Table 2 identifies the freight-related workforce within the FLZ totaling 2,845 workers. The total unemployed workforce within the FLZ includes 1,735. The analysis also identified freight-related workforce in the region, which considers additional counties in north Florida and southwest Georgia as well as the unemployed workforce in these areas. **Table 2** includes a breakdown of the available freight-related and the unemployed workforce within the FLZ and the region. The total freight-related workforce in the region totals 30,282. The total unemployment in the region totals 18,208. **Figure 14** illustrates the unemployed workforce availability within the region. Appendix D includes labor statistics within the FLZ and the region.

Existing Employment Cluster Base

Three of the four counties in the study area are not especially known for field agriculture. Rather, due to the historical influence of the St Joe Timber Company, Gulf, Franklin, and Liberty Counties have significant acreage planted in pine for pulp and wood production. Some of this annual product is delivered in the region to power and sawmill operations and some is delivered out of the region. With the emergence of the region’s importance in the production of fuel pellets, the value of the forestry and wood products offered in the four counties within the FLZ is becoming increasingly understood.

Use of Economic Development Administrations Cluster Mapping tools identified the employment clusters of Forestry and Wood Products as being either the largest or among the largest employment sectors for these largely rural counties. Figure 15 above, presents these results.

Demographic and Economic Indicators

As part of an effort to develop a regional strategy for economic transformation for thirteen counties in Northwest Florida in 2016, a Technical Report was prepared by the Haas Center at the University of West Florida, in partnership with Florida’s Great Northwest. The Technical Report identified key demographic and economic indicators supporting the fact that the population in the region is growing, the working age population is growing and the overall economic conditions are improving in the larger Northwest Florida:

- Population in the region grew 6.5% from 2010-2015, which is 59% higher than the national population growth of 4.1% over the same period. The population of residents age 0-17 grew by 3.4% in the region over the same period that the national population age group decreased by 0.7%. Likewise, the working age population (18-64) in the region grew 4.1% while the same population segment nationally grew only 2.9%. The primary cause of the population growth has been domestic migration, i.e. residents who moved into the region from another U.S. county. Domestic migration generally accounts for ten to fifteen thousand net-new residents in the region each year. The region has also seen a significant increase in international migration, which for the most recent data added 2,572 net new residents.
- The percentage of the region’s population with a bachelor’s degree or higher (23.0%) lags percentages for both Florida (26.8%) and the nation (29.3%). However, there are relatively more Associate degree holders in the region (10.3%), than the state (9.2%) and nation (7.9%).
- The most recent median household income for the region (\$48,5672) is slightly higher than state level (\$47,212) but lower than the national median household income (\$53,482); yet, average earnings in 2016 (\$47,943) are

significantly lower than state (\$53,376) and national average earnings (\$61,389).

- Between 2009 and 2016, job growth was slower in the 13-county region (6.6%) compared to state (14.1%) and national growth rates (9.0%); however, the regional unemployment rate (4.6%) was lower than state (4.9%) and national rates (5.0%)”.

Workforce Training Capabilities

There are numerous freight-related workforce training capabilities across the North Florida region, including higher education programs, machinery operation training programs, and machinery repair and maintenance programs.

Specific program types include:

Supply chain and logistics education
Industrial machinery repair and maintenance
Heavy Truck repair and maintenance
Aircraft maintenance
Heavy Equipment Operation
Truck driving

Secondary and Higher Education Certificate and Degree Programs

There is a wide variety of university, community college, technical college programs in the region that offer freight-related educational training, both in the technical and management arenas of freight and logistics.

- Florida State University

The Florida State University (FSU) Master of Business Administration (MBA) offers courses on Logistics and Supply Chain Management focusing on information technology and how it affects marketing within the supply chain. These include logistical issues and the flow of goods, services, and funds within the supply chain to the final consumer. Specific elements covered include: electronic commerce, Internet, intranets, extranets, marketing information systems and logistics information systems.

The Center for Global Supply Chain Management (GSCM) at FSU is a center of excellence in Supply Chain Management that supports the needs of organizations within the State of Florida, nationally and globally through partnerships with key stakeholders. Achieving this mission requires continuous networking between the GSCM faculty, FSU students, and member firms. The end objectives are to be a preferred provider of talent, disseminator of best practice research and developer of innovative curricula that meets the needs of world class organizations.

- Florida A&M University and Florida State University

The Florida A&M University (FAMU)-FSU College of Engineering offers several degree programs at the BS, MS, MEng, and PhD levels. The Department of Industrial and Manufacturing Engineering provides a solid industrial engineering curriculum coupled with a strong research program driven by the economic and technological development needs of society. Graduates have been employed in industrial, service or governmental organizations applying the industrial engineering skills in developing, designing, analyzing, implementing, or improving integrated systems that include people, materials, information, equipment, and energy. The Department has seven laboratories:

Affordable Composite Processing, Applied Robotics, Automated Systems, Ergonomics Optimization and Simulation, Rapid Prototyping/Precision Manufacturing, and Computer-Integrated Manufacturing. Computer facilities include CAD/CAM software, SUN workstations and servers, personal computers and much more.

Students and faculty have access to the computing facilities on both campuses. FAMU participates in an Army-funded High-Performance Computing Research Consortium operated by the University of Minnesota. Students have direct access to the high-performance supercomputers located on the University of Minnesota campus. Several engineering faculty members have a joint appointment with the National High Magnetic Field Lab. The Supercomputer Computations Research Institute (SCRI) is also located in Innovation Park. Some College of Engineering students have access to the supercomputers located in Innovation Park, which are operated by FSU's Academic Computing and Networking Services.

The Department of Mechanical Engineering is actively involved in basic and applied research designed to solve both present and future technological needs of society. The major research activities are focused in four primary areas: dynamic systems and controls (including mechatronics and robotics), fluid mechanics and heat transfer, materials science, and sustainable energy systems. State-of-the-art research laboratories are associated with each of these areas. In addition, significant research is conducted in cooperation with the following:

- Applied Superconductivity Center (ASC)
- Center for Advanced Power Systems (CAPS)
- Center for Intelligent, Systems, Control, and Robotics (CISCOR)
- Energy and Sustainability Center (ESC)
- Florida Center for Advanced Aero-Propulsion (FCAAP)
- Institute for Energy Systems, Economics, and Sustainability (IESES)

National High Magnetic Field Laboratory (NHMFL).

The Department of Civil and Environmental Engineering prepares students to plan, design, construct, maintain, and manage airports, bridges, tunnels, buildings, harbor facilities, dams, highways, waterways, pipelines, sanitation systems, and other aspects of the built environment.

- Gulf Coast State College

The Logistics and Transportation Specialist, C.C.C. Program at Gulf Coast State College (GCSC) prepares students for entry level positions in the supply chain areas of numerous industries. The program includes the core dimensions of logistics, including supply chain management, transportation and distribution, purchasing and inventory, warehouse operations, and quality and operations management. With this program, students will also develop business and managerial skills necessary for the efficient and effective performance of all operations within a company's supply chain. The Engineering Technology certification prepares students for entry level technical jobs in high tech production, manufacturing, distribution and engineering research and development facilities. It is aligned with the MSSC (Manufacturing Skill Standards Council) Certified Production Technician (CPT) certification.

The GCSC has indicated that if there is a need by industry for a particular type of employee, they will develop and offer the program that may be needed. GCSC's distributed campus system supports several communities with campuses in Panama City, Port St. Joe, Tyndall Air Force Base (AFB), and Southport.

- Northwest Florida State College

The Logistics and Supply Chain Management courses at Northwest Florida State College (NWF) provide an introduction to logistic concepts in both the business and government environment. The key concept is that logistics is a process that adds value to the end product whether it is a commercial item for a customer or a system used by the government which must achieve a desired state of readiness through an established or acquired infrastructure. Emphasis is placed on the challenges related to providing logistical support for procurement, manufacturing, and life cycle support. The course focuses on supply chain strategies, logistic information systems, order fulfillment, inventory, demand forecasting, and collaborative planning. In addition, the student is introduced to transportation constraints, third party logistics (3PL), warehousing, materials handling, international logistics and facility planning. NWF operates seven area campuses and centers in Niceville, Fort Walton Beach, Crestview, DeFuniak Springs, South Walton County, and at Eglin Air Force Base and Hurlburt Field.

- University of North Florida

The Transportation and Logistics Flagship Program curriculum at the University of North Florida (UNF) in Jacksonville emphasizes the perspective of logistics as an integrated part of Supply Chain Management (SCM). Students are exposed to courses in information systems, quantitative methods, transportation, warehouse management, distribution, international logistics, logistics management, subsystems, and a capstone project in SSM is offered. The institution offers an MBA Logistics Concentration to enhance logistics

management expertise as well as improve the student's strategic planning, financial management, and analytical skills.

In partnership with the Transportation and Logistics Flagship Program, and the American Society of Transportation & Logistics, the UNF Division of Continuing Education created the Global Logistics Training Resource Network to offer high quality continuing education for professionals engaged in the logistics and supply chain fields. These programs encompass a wide range of functional areas within the supply chain, and the courses include industry specific seminars and certifications, noncredit courses, and on-site customized training developed for jobs related to logistics and distribution.

- University of West Florida

The University of West Florida (UWF) Bachelor of Science in Business Administration in Supply Chain Logistics Management is an included program in the University's accreditation by AACSB International. The Supply Chain Logistics Management major provides students with the core knowledge to recognize, understand and manage logistics and transportation operations and market such services. UWF's Supply Chain Logistics Management course work exposes students to core supply chain management areas of logistics, transportation, materials planning and management, demand management, finished goods distribution, customer service, global and intermodal logistics, transportation brokerage and freight forwarding, logistics analytics, and procurement. The major builds an understanding of how logistics and transportation are managed by connecting students to business logistics in the field through interactions with executives in the classroom and in industry facilities. Students gain skills in identifying the critical service and cost factors when making business logistics decisions, and become equipped with

the skills to evaluate trade-offs between these factors and to ultimately make the most cost effective and service effective logistics decisions.

- Chipola College

The college offers a Bachelor of Science in Business degree which includes accounting, information systems, and management course work. The college offers business courses which support supply chain related activities.

Online Master in Supply Chain Management Degree Programs

Supply Chain Management (SCM) focuses on coordinating and integrating, within a company and among companies, the flow of goods, information, and other resources such as people and energy, between point of origin and the point of consumption to meet the requirements of consumers at the lowest possible cost.

SCM “operations-focused” jobs deal with the daily management of product flow and people, whereas SCM “planning-oriented” jobs focus on issues such as demand forecasting, supply management, performance analysis, inventory control, and troubleshooting customer problems. Chipola College’s SCM programs cover subjects such as distribution and transportation, sourcing and supplier management, operations management, inventory and forecasting, information analysis, sustainable operations management, logistic management, global operations, and more.

Machinery Repair and Maintenance Programs

There are several industrial machinery and vehicle repair and maintenance training programs in the region offering a broad range of programs:

- Tom P. Haney Technical Center – Aviation Academy

The Aviation Maintenance programs prepare students for certification by the Federal Aviation Administration (FAA). The FAA Airframe and Powerplant (A&P) Certification is required to perform maintenance and repairs on small aircraft, as well as the largest jet airplanes. Upon completion of the Aviation Maintenance Technology program and FAA certifications, one would be qualified for the following positions: Aircraft Maintenance Mechanic, Airframe Maintenance Mechanic, Powerplant Maintenance Mechanic, Aircraft Sheet Metal Mechanic or Helicopter Mechanic.

- Lively Technical Center

The A&P Technician profession offers an array of career opportunities ranging from general aviation to commercial aviation; from aircraft or component manufacturers to aircraft repair and overhaul at both domestic and foreign fixed base operations. This program consists of two sub-programs with one common core and three occupational completion points designed to train students in the skills, knowledge, and related abilities necessary for entry into the aviation maintenance profession. The student will be prepared for the FAA A&P Certification. The Aircraft Powerplant Mechanics and Aircraft Airframe Mechanics programs prepare students for employment or advanced training

in the commercial and general aviation industry. Instruction is designed to prepare students for FAA license examinations for airframe ratings.

Lively Technical Center also offers a Post-Secondary Adult Vocational (PSAV) Certificate as Medium & Heavy Duty Truck and Bus Technician. This training program will prepare students for employment as Diesel Engine Mechanics. The content includes, but is not limited to: maintaining and repairing diesel engines and electrical systems, overhauling diesel engines, and performing diesel engine preventive maintenance. The program also includes training in communication, leadership and employability skills, human relations, and safe efficient work practices.

- Tallahassee Community College

Tallahassee Community College (TCC) offers an Engineering Technology, A.S. degree that prepares students for the challenging, but highly-regarded careers of industrial machinery mechanics, general and operations managers, production and operation worker supervisors, and supervisors of mechanics, and installers and repairers. TCC also offers certificate programs in Industrial Machinery Maintenance PSAV, Machining Technologies, Welding Technology PSAV, Engineering Technologies Support Specialist, Electronic Systems Associate and Quality Improvement Associate (CQIA). The Advanced Manufacturing Training Center (AMTC) at TCC provides area industry with a one-stop center focusing on customized training and development needs. The AMTC at TCC recognizes the challenges facing companies in today's manufacturing and industrial sector; the Division of Workforce Development Team is available to customize training to employers in the region.

- Southern Regional Technical College, (Thomasville, Georgia.)

Southern Regional Technical College (SRTC) offers education and training in various technical fields of study including:

Electrical Systems Technology
Industrial Electrical Technology
Industrial Systems Technology
Welding and Joining Technology
Industrial Technician
Industrial Fluid Power Technician
Industrial Motor Control Technician
Industrial Wiring Technician
Manufacturing Maintenance Specialist
Mechatronics Specialist

- Chipola College

Chipola College offers a Bachelor of Science in Business degree which includes accounting, information systems, and management. The college offers business courses which support supply chain activities.

Chipola College offers Industrial Maintenance and Advanced Manufacturing training as well through its Engineering Technology AS degree, which involves programmable logic controls, pneumatics, hydraulics, drive train systems,

mechatronics, low voltage current, and other items related to millwright services, including:

- AS degree in Engineer Tech, specialization in Hydraulics, Pneumatics, Motors, and Programmable Logic Controllers (PLC's)
 - College Credit Certificate in Hydraulics/Pneumatics/Motors/PLC's
 - Manufacturing Skill Standards Council Certified Production Technician (MSSC-CPT) national certificate
 - Engineer Support Specialist certificate
 - Ready to sit for Six-Sigma certificate
 - Ready to sit for National Instruments LabVIEW associate developer industrial certificate
 - Automotive Technology
 - National Automotive Technicians Education Foundation (NATEF) Accredited
 - National Institute for Automotive Service Excellence (ASE) certificate
 - Civil Engineering Technology (AutoCAD, surveying, GIS mapping, building materials, etc.)
 - AS degree in Civil Engineering Technology
 - Ready to sit for AutoCAD certificate
 - Courses relevant toward Surveying certificate
 - Courses relevant toward GIS certificate
 - Industrial welding program.
- Florida Panhandle Technical College (Chipley)

The Heavy Equipment Mechanics training program offered at the Florida Panhandle Technical College (FPTC) prepares students for maintaining and repairing diesel engines and electrical systems, overhauling diesel engines, and performing diesel engine preventive maintenance. The program content also

includes training in communication, leadership, human relations and employability skills, and safe, efficient work practices. This training program also grants a PSAV Certificate and prepares students for employment as Heavy Equipment Mechanics, through this course is not currently approved for tuition assistance by any area.

- Gadsden Technical Institute (Quincy)

The Gadsden Technical Institute (GTI) offers a Power Equipment Technologies program that prepares students for further education and careers in the Transportation, Distribution, and Logistics career cluster, provides technical skills proficiency and includes competency-based applied learning that contributes to the academic knowledge of all aspects of the Transportation, Distribution and Logistics career cluster. GTI also offers a Welding Technology program for employment or advanced training.

- Bainbridge State College (Bainbridge, Georgia)

The Bainbridge State College offers an Industrial Maintenance Diploma and Technical Certificates of Credit as Industrial Electrician General, Industrial Factory Technician, Industrial Instrumentation, Industrial Machining and Industrial Maintenance Technicians.

Machinery Operation Training Programs

- Florida Panhandle Technical College (Chipley)

The Heavy Equipment Operator program at Florida Panhandle Technical College prepares students to operate several types of power construction

equipment, such as motor graders, bulldozers, scrapers, compressors, pumps, shovels, tractors, or front-end loaders to excavate, move, and grade earth, or pour concrete or other hard surface pavement. This training program offers a PSAV Certificate and prepares students for employment in the construction field as Heavy Equipment Operators. The content includes, but is not limited to: communication, employability and leadership skills, human relations, safe and efficient work practices, and skills to operate and maintain a variety of heavy equipment. This course is not approved for tuition assistance by any area. The college also offers a training program to prepare students for employment as Diesel Engine Mechanics. The content includes, but is not limited to: maintaining and repairing diesel engines and electrical systems, overhauling diesel engines, and performing diesel engine preventive maintenance. The program also includes training in communication, leadership and employability skills, human relations, and safe efficient work practices. This course is not approved for tuition assistance by any area.

- Chipola College

Chipola College also offers certification training for forklift operation as well as rigging.

Truck Driving Training Programs

Truck driver training is available through a number of providers in the region, including:

- Truck Driver Institute

The training program is designed to get students trained, licensed and certified in only 15 days, providing job placement assistance with over 20 nationwide carrier partners. The Sanford, Florida facility, which is in the Orlando metro area is the nearest facility to this region.

- Roadmaster Drivers School

This training program will prepare students for employment as professional drivers needing Commercial Driver License (CDL) certification. It provides instruction in the modern methods and techniques used to develop safe driving habits, proper handling of equipment, customer relations, and other areas of instruction that will be an asset to the transportation industry. Locations in Jacksonville, Tampa and Orlando are the closest to the FLZ region.

- National Truck Driving School

The National Truck Driving School provides training and Certificates in Truck Driver, Heavy Equipment Operator and Auto Transport Driver. A facility near Orange Park, south of Jacksonville serves this region.

- Florida Panhandle Technical College

Florida Panhandle Technical College also offers a training program to prepare students for employment as professional truck drivers. It provides instruction in the modern methods and techniques used to develop safe driving habits, proper handling of equipment, customer relations, and other areas of instruction that will be an asset to the transportation industry.

- Tallahassee Community College

TCC offers a Commercial Vehicle Driving PSAV Certificate program that teaches a multitude of skills that prepare students for entry into the trucking and logistics industry.

DEVELOPMENT INCENTIVES

When elected, Florida Governor, Rick Scott's first priority was to create jobs. His first major step for job growth was the creation of, the new Department of Economic Opportunity (DEO), which is a powerhouse of economic development tools. Enterprise Florida is a non-profit corporation established by the Legislature to serve as the state's main economic development organization, and is required to enter into a performance-based contract with DEO to conduct the state's chief marketing and business recruitment activities. There are numerous departments within DEO that administer specific incentive packages and services. CareerSource Florida is the State's linkage between business employment needs and the unemployed and under-employed workforce. The new direction of the Regional CareerSource resource centers is an employer-based focus on training to meet the needs of new and expanding businesses.

Financial assistance and incentive programs are offered by a wide range of agencies and organizations that can provide significant advantages to new development initiatives. Agencies include, Enterprise Florida, the Department of Economic Opportunity, and Federal agencies including the U.S. Economic Development Administration (EDA) and the United States Department of Agriculture (USDA). The list of opportunities and incentives is voluminous and this overview is intended to provide only a sampling of the offerings. References should be made to the parent web-sites of these agencies or the

local contacts provided, especially with respect to available funding sources, for current, specific information that may be modified from time to time based on year-to-year passage of legislation.

Various agencies provide assistance in multiple areas, so there is often programmatic overlap in service offerings, resulting in situations where matching funds can be assembled and augmented, or programmed not only contribution of required utility infrastructure, but also for reimbursements in the start-up years that can reduce risk, capital exposure and overall project capital expense.

Enterprise Florida Location Services

Qualified Target Industry Tax Refund (QTI): The Qualified Target Industry Tax Refund incentive is available for companies that create high wage jobs in targeted high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal property, insurance premium, and certain other taxes. Participating businesses locating in Florida can receive tax refunds at various levels depending on pay scaled of the new employees, imports, sector and location. For some programs, part of the tax rebate is from local funds.

Qualified Defense and Space Contractor Tax Refund (QDSC): Defense, homeland security, and space business contractors gain a competitive edge in consolidating contracts or subcontracts, acquiring new contracts, or converting contracts to commercial production. Pre-approved applicants creating or retaining jobs in Florida may receive tax refunds of \$3,000 per net new Florida full-time equivalent job created or retained, or up to \$6,000 in a rural county. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job.

High Impact Performance Incentive Grant (HIPI): In order to participate in this negotiated grant program, the project must: operate within designated high-impact portions of the following sectors: advanced manufacturing, clean energy, corporate headquarters, financial services, life sciences, semiconductors, and transportation equipment manufacturing. A project must create at least 50 new full-time equivalent jobs in a three-year period and make a cumulative investment in the state of at least \$50 million in a three-year period. Once approved by DEO, the high impact business is awarded 50 percent of the eligible grant upon commencement of operations and the balance of the awarded grant once full employment and capital investment goals are met. More information can be found here:

<https://www.enterpriseflorida.com>

CareerSource Workforce Incentives

Florida FLEX offers businesses in Florida or relocating to Florida, a completely integrated talent support solution to help them compete and grow. Participation in Florida FLEX provides help recruiting specialized talent, hiring new team members, and training existing employees. Our team of business and economic development professionals can offer expertise, funding and resources – including labor market data – to help businesses succeed. Customized training, job fairs, employee screening, and proven partnerships with local certificate and associate degree programs ensure the availability of an appropriately trained labor force.

Quick Response Training (QRT) is an employer-driven training program designed to assist new value-added businesses and provide existing Florida businesses the necessary training for expansion. A state educational facility – community college, area technical center, school district or university – is available to assist with application and program development or delivery. The educational facility will also serve as fiscal agent for the project. The company

may use in-house training, outside vendor training programs or the local educational entity to provide training.

Reimbursable training expenses include: instructors' and trainers' wages, curriculum development, and textbooks/manuals. This program is customized, flexible, and responsive to individual company needs.

Incumbent Worker Training Program provides training to currently employed workers to keep Florida's workforce competitive. The program is available to all Florida businesses that have been in operation for at least one year prior to application and require skills upgrade training for existing employees. Priority is given to businesses in targeted industries, HUB Zones, Inner City Distressed areas, Rural Counties and areas, and Brownfield areas. More information can be found here: <https://careersourceflorida.com/>

Financial Assistance

Florida First Capital Finance Corporation (FFCFC) is a Small Business Administration (SBA) "505 lender" working in partnership with DEO's Division of Strategic Business Development to provide financial assistance to start-ups, relocations from out of state, and expansions in qualified industries. More information can be found here: <https://ffcfc.com/>

Florida Investment Network (FIN) is an online matching service connecting entrepreneurs looking for funding with investors looking for profitable business opportunities. More information can be found here: <http://www.floridainvestmentnetwork.com/home>

US Department of Agriculture, Rural Programs (USDA) provides a wide range of funding to communities, organizations, and businesses in rural areas to

assist in the construction of infrastructure to support new employment and community services. The range of opportunities here is wide and diverse. The service agency for this region is housed in the Marianna Service Center. More information can be found here:

https://www.rd.usda.gov/files/RD_ProgramMatrix.pdf

- Business and Industry Loan Guarantees (B&I)
- Intermediary Relending Program (IRP)
- Rural Business Development Grants (RBDG)
- Rural Business Investment Program (RBIP)
- Rural Economic Development Loan and Grant (REDLG)
- Rural Microentrepreneur Assistance Program (RMAP)
- Value Added Producer Grants (VAPG)

Florida Department of Economic Opportunity, Small Cities Community Development Block Grants (CDBG) program provides infrastructure construction funding to extend services, usually, piped and wired utilities, roads, and drainage improvements for new or expanding businesses intending to hire employees from low to moderate income families. Grant funding up to approximately \$1.5M is available dependent upon the number of employees hired.

US Department of Commerce, Economic Development Administration (EDA) Florida's 10 Economic Development Districts are tied to the Regional Planning Councils (RPCs), where each RPC office maintains a staff member assigned to assisting in economic development projects, securing grant funding from EDA where possible, and building bridges between potential employers and local governments. Grant funding, usually at a 50/50 match, is usually available on a competitive basis for up to \$1.5M.

Special Opportunity Incentives

Florida encourages growth throughout the state by offering increased incentive awards and lower wage qualification thresholds in its rural counties. Additionally, a Rural Community Development Revolving Loan Fund and Rural Infrastructure Fund exist to meet the special needs that businesses encounter in rural counties.

Rural Economic Development Initiative (REDI) is a legislatively-created body comprised of agency directors or appointees from the State's cabinet level agencies. The REDI board meets monthly to discuss development initiatives, determine best programs to provide assistance and ensures that agency heads are aware of projects being submitted for approvals or permitting. REDI can issue some waivers of fees, expedited permitting, and coordination assistance in progressing through Florida's regulatory framework.

Brownfield Incentives Florida offers incentives to businesses that locate on a brownfield site with a Brownfield Site Rehabilitation Agreement (BSRA). The Brownfield Redevelopment Bonus Refund is available to encourage Brownfield redevelopment and job creation. Approved applicants receive tax refunds of up to \$2,500 for each job created. The Voluntary Cleanup Tax Credit program offers State Tax rebates for rehabilitation of contaminated sites. These credits in conjunction with Federal Brownfields incentives and other site specific State programs can improve a project's initial capital outlay programming as well as encouraging development of properties that would otherwise be sidelined.

Economic Development Transportation Fund commonly referred to as the "Road Fund," is an incentive tool designed to alleviate transportation problems

that adversely impact a specific company's location or expansion decision. The award amount is based on the number of new and retained jobs and the eligible transportation project costs, up to \$3 million. The award is made to the local government on behalf of a specific business for public transportation improvements.

Northwest Florida Regional and Local Incentives

Florida Statutes require that units of local government report on financial incentives that promote economic development. For the annual surveys and report, county and municipal economic development incentives are classified into the following four general types:

- Direct financial incentives to businesses;
- Indirect financial incentives benefiting businesses;
- Tax-based and fee-based incentives to businesses; and
- Below-market rate leases or deeds for real property given to businesses.

To the extent that counties and municipalities expend funds or forego revenue through these means, they qualify as economic development incentives for the purposes of state reporting. Based on the 2015 and 2016 reports to the State Legislature on County Funded Economic Incentives, none of the four counties in the FLZ provided direct economic incentives during that period.

- Gadsden County

In 2016, the Gadsden County Development Council (GDC) brought forth, and the Gadsden County Board of County Commissioners (BOCC) adopted, a well-vetted economic development grant policy that provides financial incentives for game-changing job creation and capital investment. This policy is classified under the tax-based or fee-based incentives to businesses as enumerated above.

The grant program was modeled on successful programs implemented in Suwanee County and refined by the Gadsden County GDC. The adopted policy invests a portion of new to County revenues generated by job production, wage scale, construction investment and other project specific criteria. The grant is paid over three to seven years after the investments have been made and jobs are created, and are a reward for competency and completion rather than a pre-construction award. The full text of the policy for Gadsden County is included in Appendix D. Gadsden County has also adopted a local ad valorem tax exemption policy. Qualifying projects may apply for one or the other, not both.

- Liberty

Liberty County has an incentive policy, adopted by ordinance that can provide tax forgiveness of up to 100% of tax liability for up to 10 years. Each applicant would have to make its own case for the percentage and term of the benefit on a case by case basis.

- Gulf County

Gulf County has an incentive policy, adopted by ordinance that can provide tax exemptions for new and expanding business in Gulf County.

- Franklin County

Franklin County does not have policies in place that would qualify as economic incentives according to the State's definition.

CONSISTENCY WITH LOCAL PLANS

Local Government Comprehensive Plans

As previously stated, as part of the process to designate the Gulf to Gadsden FLZ, a Strategic Sites Inventory (SSI) project was conducted in each of the four counties. The SSI identified potential high quality industrial and commercial sites situated along or near key transportation assets in the region in order to market these sites for development of manufacturing and distribution projects that rely on multimodal transportation facilities. The Strategic Sites Inventory is contained in Appendix A.

Table 3 presents the information identified as a result of the SSI report, the governing jurisdiction, the FLUM designation and the intended land use of each strategic site. The FLUM designation for the SSI sites was researched and ascertained by the Apalachee Regional Planning Council. Potential land uses were obtained from the corresponding governing jurisdiction for each site and are labeled according to the following key:

- F-L Freight Logistics
- I-C Industrial/Commercial
- T-B Technology/Business Park
- ILC Intermodal Logistics Center

Due to the rural location of most of the selected sites, the current FLUM designation of these sites in each county is “Agriculture”. The City of Gretna is the local government with jurisdiction over the proposed ILC in Gadsden County; its designation of the site as Mixed Use would prohibit large scale industrial development. Therefore, a comprehensive plan amendment would be required to allow the proposed development of the ILC.

TABLE 3: Future Land Use Map designation and Potential Land Use

COUNTY	Site ID	SSI Phase	Acres	Governing Jurisdiction	FLUM Designation	Consistency with FLUM	Potential Land Uses
Gadsden	12029-001	III	621	Gretna	Mixed Use	No	F-L (ILC)
Gulf	12045-017	I	296.9	Gulf Co.	Agriculture	No	F-L
Gulf	12045-018	I	178.4	Gulf Co.	Agriculture	No	F-L
Gulf	12045-019	I	126	Gulf Co	Agriculture	No	F-L/T-B
Gulf	12045-020	I	210.5	Gulf Co	Agriculture	No	F-L
Gulf	12045-021	I	116.3	Gulf Co	Agriculture	No	F-L (ILC)
Gulf	12045-022	I	139.6	Gulf Co	Agriculture	No	F-L
Gulf	12045-024	I	158.4	Gulf Co	Agriculture	No	F-L
Franklin	12037-001	I	978.4	Franklin Co	MU-Res Agriculture ¹	No	I-C / F-L
Franklin	12037-002	I	65.4	Franklin Co	Industrial	Yes	T-B
Franklin	12037-003	I	122.6	Franklin Co	Industrial	Yes	T-B
Franklin	12037-004	I	210.4	Franklin Co	Industrial/Residential	Potentially	I-C/T-B
Liberty	12077-001	I	126.7	Liberty Co.	Rural Village	No	I-C / F-L
Liberty	12077-002	I	44.2	Liberty Co	Industrial/Rural Village	Potentially	I-C / F-L
Liberty	12077-003	I	252..2	Liberty Co	Rural Village /Agriculture	No	I-C / F-L
Liberty	12077-004	I	1179.3	Liberty Co	Agriculture	No	I-C / F-L
Liberty	12077-005	I	72.8	Liberty Co	Industrial	Yes	I-C / F-L
Liberty	12077-005	I	925.3	Liberty Co	Industrial/Agriculture	Potentially	I-C / F-L

¹Portions of 12037-001 in Franklin County are in Industrial and Public Facilities, these areas are already occupied by airport, prison, and the City of Apalachicola WWTP are not re-developable.

It appears that most of the sites would require an amendment to the local government comprehensive plans to allow development of the anticipated potential land uses and support economic development in these areas. Few of the comprehensive plans for the four counties and corresponding municipalities within the FLZ permit industrial development in lands with an Agricultural FLUM designation. To move forward to development of the SSI sites, it is recommended that the local governments move forward with map and/or text amendments that would permit the development of the sites as intended.

Other Considerations for Potential Land Uses

The sites evaluated possess adjacency to the roadway network and most are adjacent or near the AN railroad or the Gulf County Canal. Those parcels of greater area shown in Table 3 will potentially be developed with commercial, and some industrial uses, with industrial being the more prominent use on those sites in remote, rural locations. Commercial developments require proximity to other commercial activity. Freight logistics uses require immediate access to the transportation network. Access to workforce in a density to satisfy North American Industry Classification System (NAICS) standards also limits technology/business park developments to areas proximate to population centers.

Two of the sites, the Gadsden Site 12029-001 and Gulf County's 12045-21 are being considered for Intermodal Logistics Center (ILC) designation. This designation requires a commitment by the local government as well as the landowner and those outcomes are beyond the purview of this report.

Consistency with the Port of Port St. Joe Master Plan

The Master Plan is focused on repairing lost capabilities of the facility and its approaches by water, road and rail. The ultimate goal of that Master Plan is the revival of the port and development of the infrastructure that will permit through put of bulk material from water transport to rail or road carriers. To that extent the FLZ is fundamentally consistent with the goals of the Port's Master Plan. Significant Port projects include dredging the channel, turning basin and the Gulf County Canal, and extension of appropriate infrastructure to manufacturing sites.

Consistency With Adopted Long-Range Transportation Plans of a Metropolitan Planning Organization.

The Capital Region Transportation Planning Agency is the only MPO with jurisdictional overlap of the FLZ. The potential ILC in Gadsden county is consistent with the Capital Region Transportation Planning Agency (CRTPA) Regional Mobility Plan:

"The CRTPA facilitates a regional, cooperative planning process that serves as the basis for spending the region's state and federal transportation funds for improvements to roads, bridges, public transit, freight routes, and bicycle and pedestrian networks."

The MPO considers 9 broad planning factors for their long range transportation planning program, including; Connectivity, Economic Development, Access, Multimodalism, Land Use, Security, Safety, Public Health, and Natural Resource Protection/Conservation. The ILC is an essential factor in a health freight transportation network and is therefore part of the freight

route helping to improve economic development, access, multimodalism and connectivity.

Consistency with other Regional Planning Initiatives

The Region is blessed with several pro-active planning and economic development partners that have or are developing long range planning documents. In addition to the Port and Airport master plans that have site specific recommendations and wish lists, many of these regional entities have long range planning documents that should include at minimum a consideration of the FLZ recommendations and at best an endorsement of those projects and inclusion of the FLZ in updates.

The Apalachee Regional Planning Council will be updating its Comprehensive Economic Development Strategy document in the summer/fall of 2017. That document informs the U.S. Department of Commerce’s Economic Development Administration of key federal investment opportunities that will promote job growth and enhance the economic base in the ARPC’s region.

Florida’s Great Northwest (FGNW) has just adopted a five-tiered planning initiative that has created sub-committees to coordinate region wide investment programs. The FGNW document should necessarily also be informed of and include key projects that would promote the FLZ.

Opportunity Florida is the managing entity that helps coordinate economic development and workforce development in Florida’s Northwest Region of Economic Opportunity. To the extent that these regional entities overlap in mission and regional impact, their efforts should be considered and addressed in some of the key projects recommended herein in their updated reports.

Strategic Infrastructure Improvements Element

The following tables are taken from a variety of sources including FDOT, The Port Authority, the North Florida Transportation Corridor Authority, the Apalachicola Airport Study and others we have the following:

Table 4. Port of Port St. Joe, Capital Improvements Plan (UPDATE COSTS)

Project Description	TOTALS
Dredging	
Dredge Material Management Plan	\$600,000
Permitting	\$900,000
Dredging to 35'	\$40,000,000
15% Contingency	\$3,225,000
Dredging Sub-Total	\$44,725,000
Manufacturing Sites	
Bulkhead	\$5,000,000
Utilities	\$850,000
Security	\$140,000
Rail Extension to Parcel B	\$900,000
Rail Road to Old Mill Site.	\$1,000,000
Former Arizona Chemical Site (Kenny Mill Rd)	\$1,000,000
10% Contingency	\$357,000
Manufacturing Sites Sub-Total	\$9,247,000
TOTALS	\$53,972,000

Source: Port of Port St. Joe, Commission

Table 5 presents data from FDOT’s Five Year and SIS Planning documents and the North Florida Transportation Corridor Authority:

Table 5. Strategic Infrastructure Improvements Gulf County

Improvements			
Facility	From	To	Improvement
Port of Port St. Joe	US 98 Intersection	AN Rail	Intersection Crossing Improvements
SR 71	South of Ave A and Chemical Dr.	I-10	Capacity (4 lanes)
SR 71	Industrial Road		Passing Lanes
SR 71	at Wewahitchka		Bypass
SR 71	at Altha		Bypass
SR 71	Port St. Joe		Over Pass at Rail crossing
US 98	Mexico Beach	US 231	Gulf Coast Parkway
SR XX	Windmark	Tyndall AFB	Gulf to Bay Highway
CR 382			Capacity (4 lanes)

Table 6. Strategic Infrastructure Improvements Franklin County

Improvements			
Facility	From	To	Improvement
SR 65	Eastpoint/US98	I-10	Capacity (4 lanes)
Apalachicola River Trestles and Bridge			Repair
AN Railway	Apalachicola	Telogia	Rehabilitate 19 miles of track & bridges

Table 7. Strategic Infrastructure Improvements Apalachicola Regional Airport

Airport Improvements		
Facility	Description	Improvement
Rail Spur	From AN to Airport	2 Mile Spur
Large Hanger		
T-Hanger		

As the sites identified in the LL+D Strategic Sites Inventory progress through the stages of identifying sites that warrant a more thorough review, additional projects will be identified which will require local government coordination, permitting, environmental clearances and assessments of needed support infrastructure to support those sites. For instance, if the proposed Gadsden ILC (Gadsden site 12029-001) moves forward, a rail spur, local road improvements and piped and wired utility extensions would be required to serve the project. Identification of those site specific costs are beyond the scope of this report.

Table 8. Strategic Infrastructure Improvements at SSI sites.

Site Improvements	
County/Site	Description/Improvement
Gulf	Sewer Extension from PSJ to White City
Gulf/12045-021	Road Improvements to L&P Site (Potential ILC)
Gulf	Rail Extension to the Bay
Gulf	Rail Extension along Gulf Canal
Gulf	Rail Repair to L&P (Potential ILC) Site
Gulf	Turning Basin Dredging
Gulf	Access Road to Canal Sites Along New Rail
Gulf	Pre-Treatment of PSJ Sewer Plant
Franklin/12037-002	Need All Utilities
Franklin/12037-003	Expand Site if Runway Closes
Franklin/12037-004	Need All Utilities
Franklin/12037-007	Residential Development/Zoning Change
Franklin (4 sites)	Need road access, access to water and sewer
Liberty	Widening of CR 67
Liberty	I-10/SR 65 Interchange (New Construction)
Liberty	SR 65/CR 67 Rail Siding
Liberty	CR 65, Lowry Chip Mill Site Resurfacing/Maintenance (1 mile)
Liberty	Rail Spur, Sunshine Cypress Site
Liberty	Forest Road 22 (Cut from Port to Tallahassee)
Liberty	SR 65/CR 267 Rail Siding repairs
Liberty	Road improvements to infrastructure already in place
Gadsden/ILC	Construction of Rail Spur to ILC Site

Gadsden/ILC	Construction of Access Road from SR 12 to ILC Site Rail Spur
Gadsden/ILC	Natural Gas routed to site
Gadsden/ILC	Improvements to electrical infrastructure (Duke + Talquin)
Gadsden/ILC	Land Use change from Mixed Use/Commercial to Industrial
Gadsden/ILC	Annexation of Western Property adjacent to Rail
Gadsden/ILC	Addition of Water (fire suppression) and sewer capabilities

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